USER GUIDE

www.cellardoormetrics.com

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This User Guide has been written to accompany the CellarDoorMETRICS® system (Version 2.3).

WHAT IS A CELLAR DOOR?

What do we mean when we use the term ‘Cellar door’?

We are referring to the place where a winery sells their wine direct to the consumer via a retail store. These stores are often onsite, or in a nearby town. A Cellar door usually provides wine tastings and attracts tourists and wine lovers alike!

You may know a Cellar door by another name like…

TASTING ROOM

WINERY BOUTIQUE

WINERY SHOP

CAVÉ

or simply

CELLAR.

At CellarDoorMETRICS®, we call it ‘Cellar door’.

But whatever you call it, you can measure your sales performance using CellarDoorMETRICS®.

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INTRODUCTION

So your Cellar door appears to be doing well. But have you ever wondered how well? Have you ever wondered if you attract as many visitors as the next guy down the road, and do they spend as much when they do visit? Maybe you're a star performer...or maybe you're not!

Why don't you find out?

CellarDoorMETRICS® is an international benchmarking program that enables you to track the performance of your Cellar door and other wine tourism facilities like winery tour, produce, restaurant, function and accommodation sales.

By recording your visitor numbers and sales revenues, you can report on trends and compare your results with other Cellar doors in your region, country or around the world.

What do you have to do?

Reading this manual is a great start! Being familiar with the terminology and goals of the site will help too – so keep on reading this introduction and then follow the step-by-step instructions provided in this manual to set up your subscription on CellarDoorMETRICS®.

You will be guided through how to register on the CellarDoorMETRICS® website. This involves providing your company and contact details. You can then create a secure logon for each user of the system and set up your Cellar door information.

Then it is simply a matter of logging on each week to update your secure registration with your visitor numbers, bottles sold and sales revenues – for your Cellar door and any restaurant, accommodation and function facilities you may have. (There is a Weekly Data Collection Form to help collect all of these details).

You can also record special events/marketing campaigns and then report on the impact of these on sales and visitor levels.

And from the moment you have entered your first week's information, you can run reports to get the answers to those questions that have been bugging you for some time…like:

How many visitors come to my Cellar door each day that we trade?

How much does each visitor spend when they are here?

How much do they spend on wine, merchandise, service, Cellar door food and beverage, restaurant food and beverage and accommodation?

How many visitors do we have at functions?

How much does each function visitor spend?

How do each of these numbers compare with the average for all Cellar doors for my tourism region, my country or internationally?

How do each of these numbers compare with the average for Cellar doors that have a similar turnover for my tourism area, for my country or internationally?

How is my relative performance going? Am I staying ahead of the pack or am I falling behind?

Is my Cellar door a STAR PERFORMER or is it an ALSO RAN?

And with a few weeks' data under your belt, you'll be able to see trends, pick holes, identify opportunities and really make some decisions to improve your performance. .

How do I get the most out of CellarDoorMETRICS®

To get the ***most*** out of your CellarDoorMETRICS® subscription, here are a few extra tips:

1. Update your data each week

   You can gain a lot from CellarDoorMETRICS® just by updating your Cellar door sales and visitor data each week. This not only ensures that your data is up-to-date, but saves you time in the long run. By taking five to ten minutes to logon each week to update your information, you'll be ready to access your latest sales information at any time and will, therefore, get more meaningful reports when comparing your sales effort.

2. Get your neighbors involved

   To improve your Cellar door business at a local level, you really need to be able to compare with other providers in your region – so get your neighbors involved! When Cellar doors down the road are also entering their sales and visitor data, you will see how your visitor numbers compare. Are you attracting your fair share? How does your average sale compare with your region's average? The answers to these questions will help you to identify opportunities to improve your business.

3. Get your local wine tourism organization involved

   CellarDoorMETRICS® can provide your local wine industry/tourism organization with tools to drive implementation of the system in your region. The more Cellar doors using the system, the better the information and the more benefit all users will derive.

About CellarDoorMETRICS®

CellarDoorMETRICS® is an online cellar door benchmarking tool developed by Morton Blacketer and the Winemakers' Federation of Australia (Australia's peak wine industry body) with the cooperation of the Australian State and National Tourism Organizations to analyze the performance of Australia's cellar doors and create national benchmarks.

The program was trialed by the Australian wine industry before being launched internationally. To find out more about the Australian pilot, visit www.cellardoormetrics.com.au or www.wfa.org.au/CDM.htm.

Our clients include small winery Cellar doors, right up to major international wine corporations, along with regional and national tourism and wine industry organizations.

Morton Blacketer Online Pty Ltd is a leading provider of online wine industry, agri-business and benchmarking web portals. In 2004, the company launched VineAccess (www.vineaccess.com), a web portal for the sharing of food safety and crop data between winegrape growers and their winery customers. In 2006, the company launched CellarDoorMETRICS®. Find out more about Morton Blacketer at www.mortonblacketer.com.au.

Some of the finer details

What Internet browsers support CellarDoorMETRICS®?

CellarDoorMETRICS® is written specifically to support Microsoft Internet Explorer and Mozilla Firefox (for versions supported, please refer to Help). Both of these browsers are able to be downloaded to any computer free of charge from the Internet.

What currency does the system use?

Although you pay for CellarDoorMETRICS® in Australian dollars, you record your sales data in your local currency – so if you are from the United States of America, you enter your sales in US Dollars, New Zealand users enter New Zealand Dollars, South African users enter the Rand, Europeans the Euro, Australians enter Australian Dollars etc. When you run a report to compare your Cellar door performance with Cellar doors internationally, the system will automatically convert international sales reported into your local currency (using the current day's exchange rate).

Is my commercial data safe?

Yes. Each organization registers online for secure access to the CellarDoorMETRICS® portal and their own sales and visitor data. During the registration process, you will nominate a User Name and Password – please keep these confidential.

Reports provide aggregated information. The information is aggregated into groups of three or more Cellar doors – so you can't just subtract your data to find out the exact sales of another Cellar door. If less than three Cellar doors have entered data, then no results will be published. The site also has appropriate firewalls and controls in place to protect your information.

Can data be shared between Cellar doors in the one company?

Yes. If your wine company has a number of Cellar doors, you can nominate specific Cellar doors to form a closed group for data sharing, enabling management to compare performance across the group.

What does 'region' mean?

Ideally, 'region' refers to your 'appellation' or 'geographic indicator' wine region, however, to ensure that you have Cellar doors in your area to compare with; 'regions' have been expanded to include surrounding areas. As more Cellar doors come onto the system, we will be able to reduce the region's catchment area to become more representative of your wine appellation.

For further explanation about the 'terms' used by CellarDoorMETRICS®, please refer to the Glossary at the back of this manual or to FAQs on the website at www.cellardoormetrics.com.

REGISTERING AND LOGGING ON

From here on in, this manual will provide you with the step-by-step instructions to follow to set up your company's registration on the CellarDoorMETRICS® web portal.

First of all, you will need to register as a client in the system. This really is a simple stage and just a matter of following the screen prompts to ensure that you provide the appropriate contact details for your company and staff who will be using the web portal, and then setting up the scope of your Cellar door, restaurant, function and accommodation facilities.

On the second and subsequent times you enter the system, you will need to identify yourself using the username and password you have chosen during the initial setup.

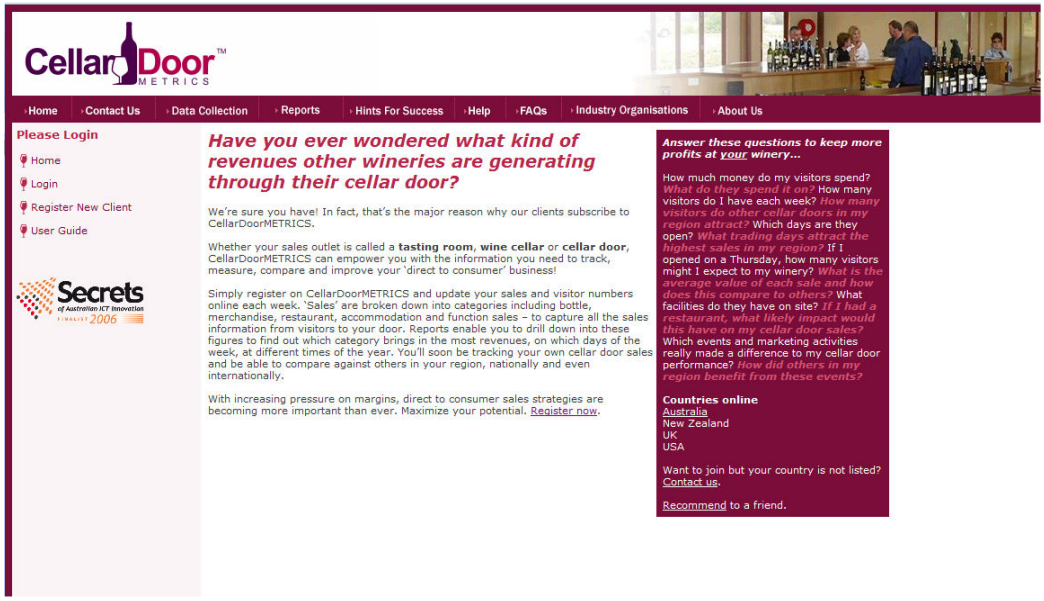
Logging on the first time

There are five stages in this process:

1. Accept the Terms and Conditions
2. Register your company
3. Register the main person who will administer the program
4. Payment (by monthly credit card installments)
5. Setting up your Cellar door details (address, days open etc).

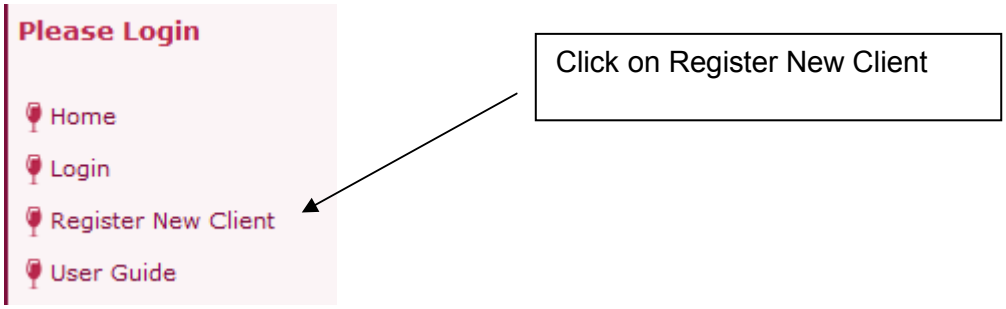
Entering the system

1. To enter the CellarDoorMETRICS® system you will need to open a Web browser and type the following address into your browser.
2. Enter ***http://www.cellardoormetrics.com*** in your browser address line.
3. This will display the CellarDoorMETRICS® Home screen


CellarDoor METRICS
Home
Contact Us
Data Collection
Reports
Hints For Success
Help
FAQs
Industry Organisations
About Us
Please Login
Home
Login
Register New Client
User Guide
Secrets of Australian ICT Innovation 2006
Have you ever wondered what kind of revenues other wineries are generating through their cellar door?
We're sure you have! In fact, that's the major reason why our clients subscribe to CellarDoorMETRICS.
Whether your sales outlet is called a tasting room, wine cellar or cellar door, CellarDoorMETRICS can empower you with the information you need to track, measure, compare and improve your 'direct to consumer' business!
Simply register on CellarDoorMETRICS and update your sales and visitor numbers online each week. 'Sales' are broken down into categories including bottle, merchandise, restaurant, accommodation and function sales – to capture all the sales information from visitors to your door. Reports enable you to drill down into these figures to find out which category brings in the most revenues, on which days of the week, at different times of the year. You'll soon be tracking your own cellar door sales and be able to compare against others in your region, nationally and even internationally.
With increasing pressure on margins, direct to consumer sales strategies are becoming more important than ever. Maximize your potential. Register now.
Answer these questions to keep more profits at your winery...
How much money do my visitors spend? What do they spend it on? How many visitors do I have each week? How many visitors do other cellar doors in my region attract? Which days are they open? What trading days attract the highest sales in my region? If I opened on a Thursday, how many visitors might I expect to my winery? What is the average value of each sale and how does this compare to others? What facilities do they have on site? If I had a restaurant, what likely impact would this have on my cellar door sales? Which events and marketing activities really made a difference to my cellar door performance? How did others in my region benefit from these events?
Countries online
Australia
New Zealand
UK
USA
Want to join but your country is not listed? Contact us.
Recommend to a friend.

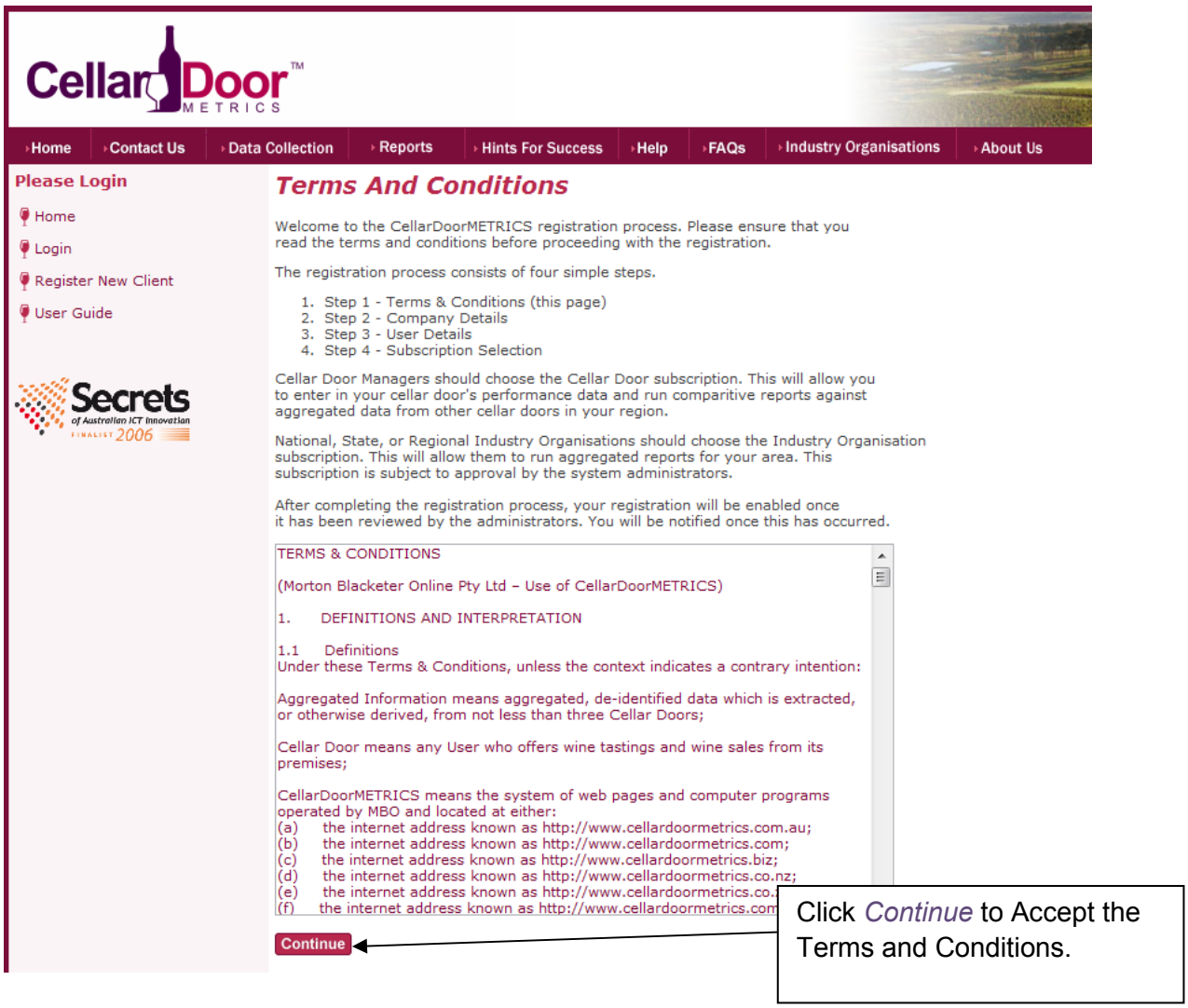
Register your Company

This begins simply with clicking on the Register New Client menu item and proceeding to read and accept the website's Terms and Conditions.



Terms and Conditions

Read the Terms and Conditions carefully and click on *Continue* to accept.

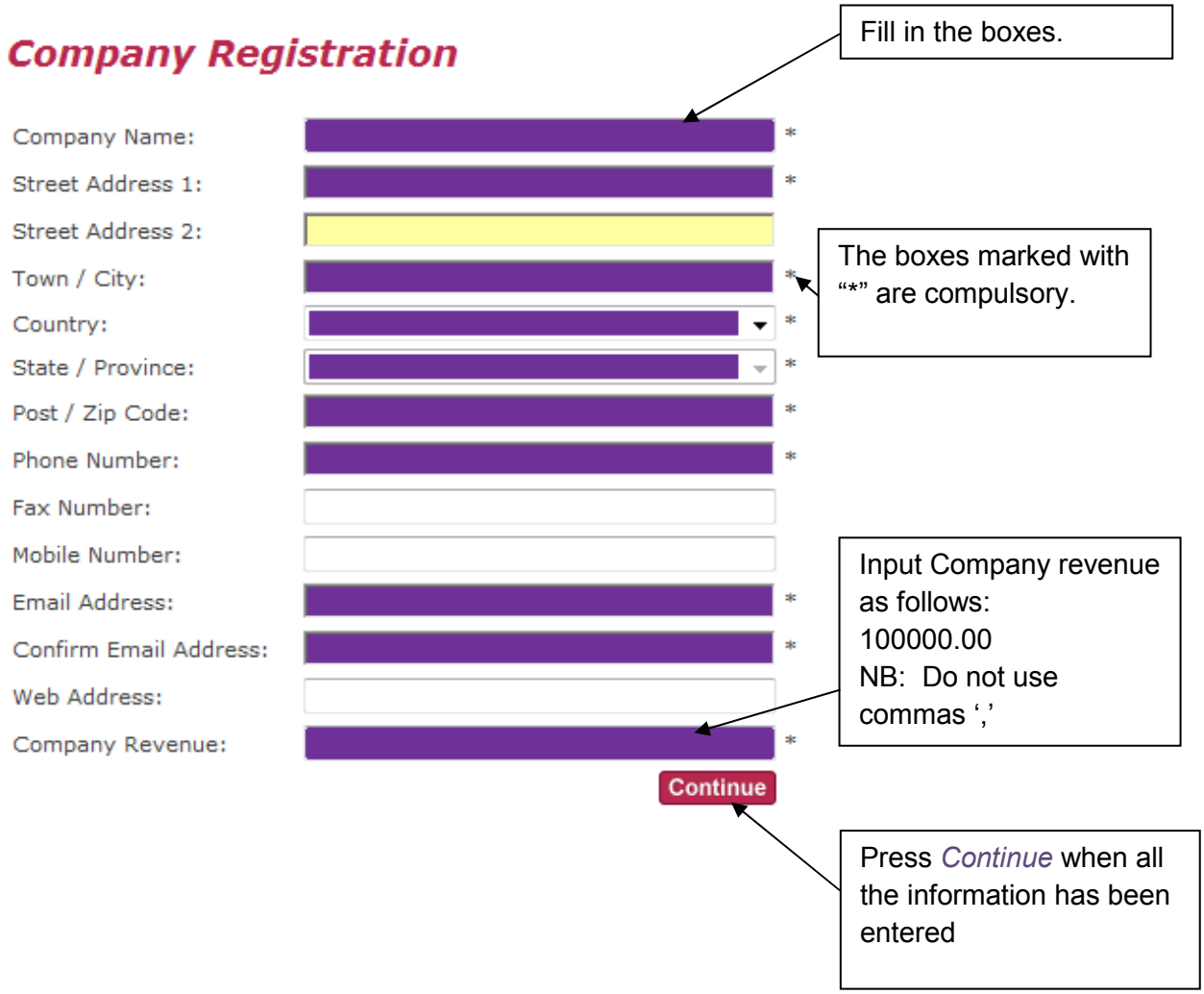

CellarDoor METRICS
Home
Contact Us
Data Collection
Reports
Hints For Success
Help
FAQs
Industry Organisations
About Us
Please Login
Home
Login
Register New Client
User Guide
Secrets of Australian ICT Innovation FINALIST 2006
Terms And Conditions
Welcome to the CellarDoorMETRICS registration process. Please ensure that you read the terms and conditions before proceeding with the registration.
The registration process consists of four simple steps.
1. Step 1 - Terms & Conditions (this page)
2. Step 2 - Company Details
3. Step 3 - User Details
4. Step 4 - Subscription Selection
Cellar Door Managers should choose the Cellar Door subscription. This will allow you to enter in your cellar door's performance data and run comparitive reports against aggregated data from other cellar doors in your region.
National, State, or Regional Industry Organisations should choose the Industry Organisation subscription. This will allow them to run aggregated reports for your area. This subscription is subject to approval by the system administrators.
After completing the registration process, your registration will be enabled once it has been reviewed by the administrators. You will be notified once this has occurred.
TERMS & CONDITIONS
(Morton Blacketer Online Pty Ltd – Use of CellarDoorMETRICS)
1. DEFINITIONS AND INTERPRETATION
1.1 Definitions
Under these Terms & Conditions, unless the context indicates a contrary intention:
Aggregated Information means aggregated, de-identified data which is extracted, or otherwise derived, from not less than three Cellar Doors;
Cellar Door means any User who offers wine tastings and wine sales from its premises;
CellarDoorMETRICS means the system of web pages and computer programs operated by MBO and located at either:
(a) the internet address known as http://www.cellardoormetrics.com.au;
(b) the internet address known as http://www.cellardoormetrics.com;
(c) the internet address known as http://www.cellardoormetrics.biz;
(d) the internet address known as http://www.cellardoormetrics.co.nz;
(e) the internet address known as http://www.cellardoormetrics.co.
(f) the internet address known as http://www.cellardoormetrics.com
Continue
Click Continue to Accept the Terms and Conditions.

Company Registration

You will need to provide the name, address and contact details for your company – the organization that owns the Cellar Door.

You will need to ensure that you can provide the information relating to the boxes that are highlighted in purple or marked with an asterix '*' below before you begin.

You will also note that this web page asks for your Company Revenue. Company Revenue encompasses your whole company (i.e. the whole enterprise that produces wine - not just the Cellar door sales. That includes everything from distributor to mail order, export and restaurant trade sales etc). You should provide an approximate figure (to the closest 100,000 is good enough). This is needed as CellarDoorMETRICS® enables you to compare your Cellar door with other Cellar doors that fall within the same revenue category when you run reports. (You can, by the way, compare with all Cellar doors, regardless of Company Revenue). Categorizing by Company Revenue provides an idea of how company resources may impact Cellar door sales.



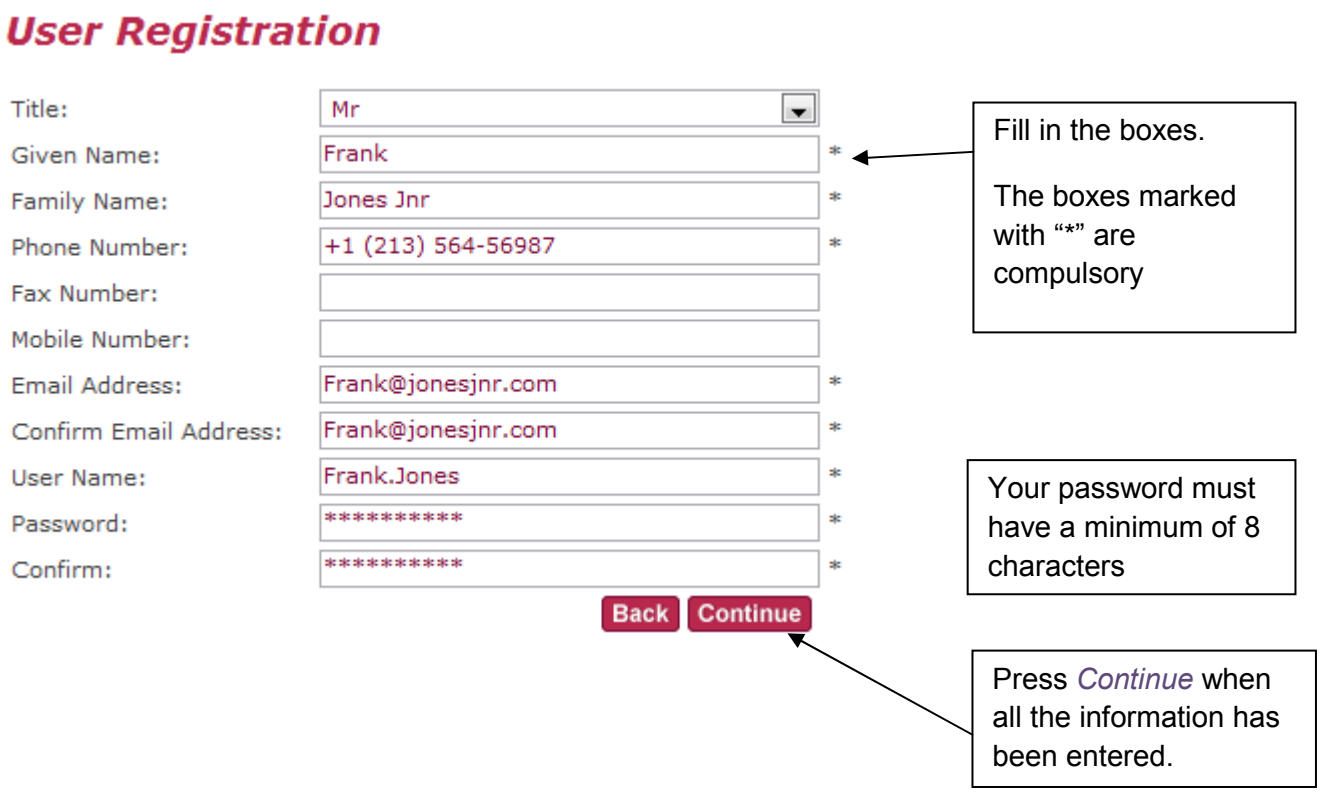
User Registration

It is best to select someone within your organization to look after your CellarDoorMETRICS® account. We call them your 'Company Administrator'.

This person will have the authority to access all levels of information you input to the web portal, including the ability to add or deactivate users, add Cellar doors and change any information relating to your Company. They will also receive all notifications from CellarDoorMETRICS®. These may include things like reminders to update your sales and visitor information or advice on new system functionality and benefits.®®

If you have other members of the company who will input Cellar door data or run reports, they can be added as additional users (please see page 32 adding/deleting a user).

So make sure you have your Company Administrator's details ready and fill in the information requested on screen.


User Registration
Title: Mr
Given Name: Frank *
Family Name: Jones Jnr *
Phone Number: +1 (213) 564-56987 *
Fax Number:
Mobile Number:
Email Address: Frank@jonesjnr.com *
Confirm Email Address: Frank@jonesjnr.com *
User Name: Frank.Jones *
Password: ********** *
Confirm: ********** *
Back Continue
Fill in the boxes.
The boxes marked with "*" are compulsory
Your password must have a minimum of 8 characters
Press Continue when all the information has been entered.

Subscription

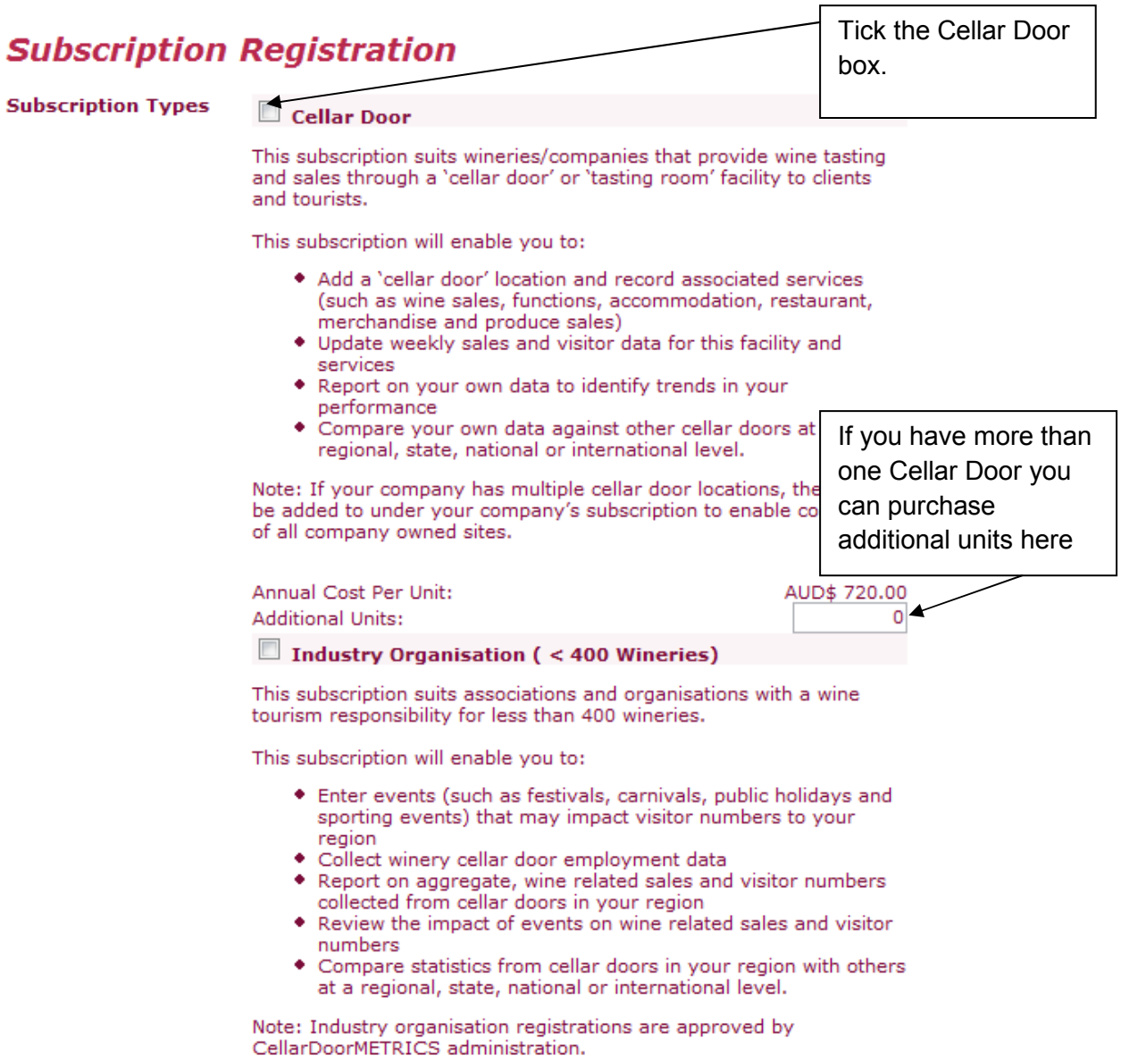
Now it is time to choose your subscription type.

There are two types of subscriptions to choose from: Cellar Door or Industry Organisation.

A winery wishing to track their Cellar door sales and benchmark their performance should choose the 'Cellar Door' subscription. If you have more than one Cellar door, you add them at this step by selecting 'Additional Units'.

A wine or tourism industry organization wishing to track regional visitor numbers and aggregate sales, register events and benchmark performance, should select the 'Industry Organisation' subscription. This subscription type is provided based on the number of wineries in your region. E.g. if you have 600 wineries in your region, you will select the second level 'An industry organization with less than 1,000 wineries in their region'.

More information about the subscription types can be found online at www.cellardoormetrics.com.

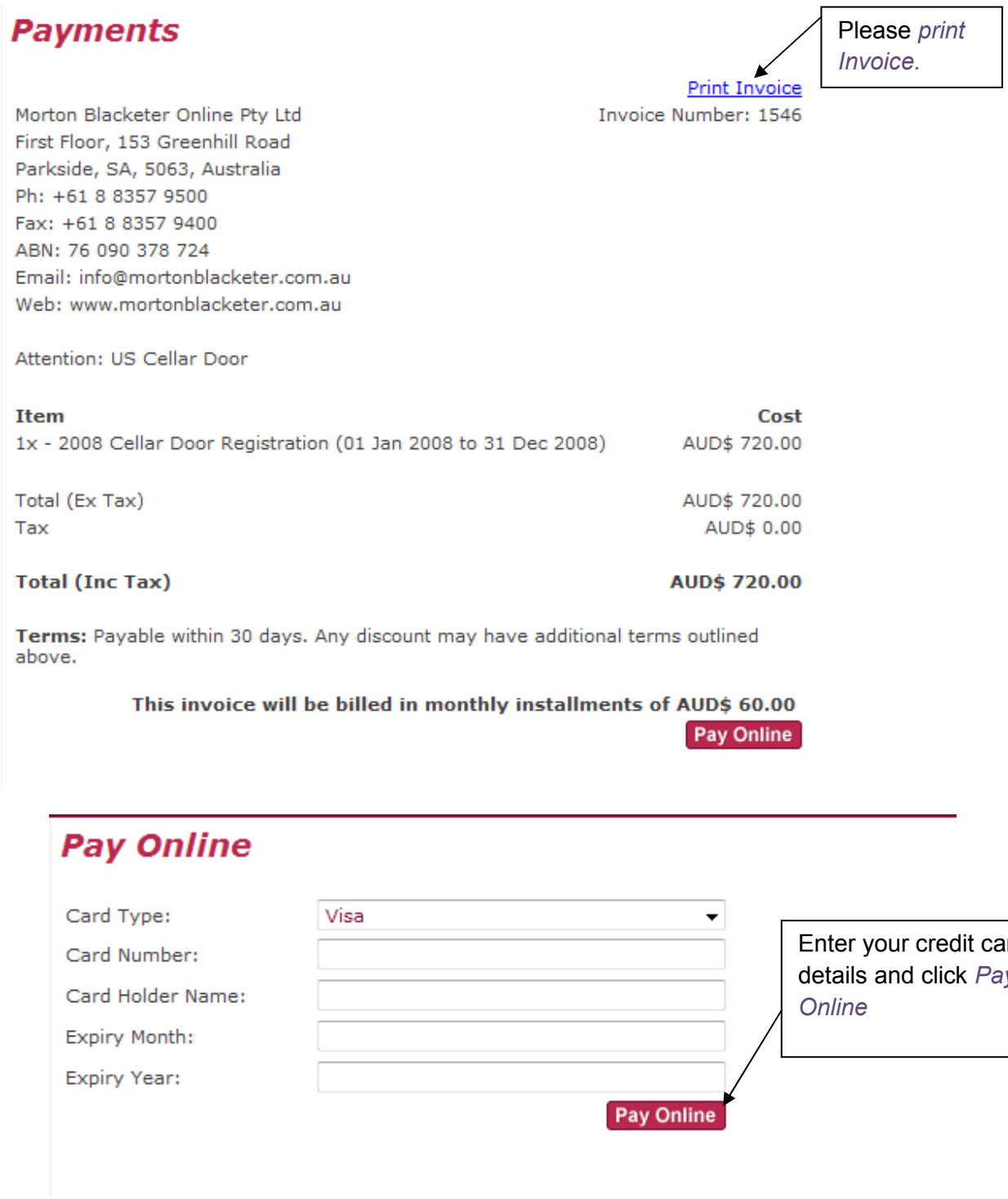

Subscription Registration
Subscription Types
Cellar Door
This subscription suits wineries/companies that provide wine tasting and sales through a 'cellar door' or 'tasting room' facility to clients and tourists.
This subscription will enable you to:
Add a 'cellar door' location and record associated services (such as wine sales, functions, accommodation, restaurant, merchandise and produce sales)
Update weekly sales and visitor data for this facility and services
Report on your own data to identify trends in your performance
Compare your own data against other cellar doors at regional, state, national or international level.
Note: If your company has multiple cellar door locations, the be added to under your company's subscription to enable co of all company owned sites.
Annual Cost Per Unit: AUD$ 720.00
Additional Units: 0
Industry Organisation (< 400 Wineries)
This subscription suits associations and organisations with a wine tourism responsibility for less than 400 wineries.
This subscription will enable you to:
Enter events (such as festivals, carnivals, public holidays and sporting events) that may impact visitor numbers to your region
Collect winery cellar door employment data
Report on aggregate, wine related sales and visitor numbers collected from cellar doors in your region
Review the impact of events on wine related sales and visitor numbers
Compare statistics from cellar doors in your region with others at a regional, state, national or international level.
Note: Industry organisation registrations are approved by CellarDoorMETRICS administration.
Tick the Cellar Door box.
If you have more than one Cellar Door you can purchase additional units here

Industry Organisation (< 1000 Wineries)
This subscription suits associations and organisations with a wine tourism responsibility for less than 1000 wineries.
Industry Organisation (< 3000 Wineries)
This subscription suits associations and organisations with a wine tourism responsibility for less than 3000 wineries.
Industry Organisation (< 6000 Wineries)
This subscription suits associations and organisations with a wine tourism responsibility for less than 6000 wineries.
Industry Organisation (6000+ Wineries)
This subscription suits associations and organisations with a wine tourism responsibility for 6000 or more wineries.
Press Continue when all the information has been entered.
Back
Continue
NOTE: Chosing a subscription type automatically gives you one unit at the given price. Additional units are added on top of that.

Payment

You can pay for your CellarDoorMETRICS subscription online, using your credit card. Payments will be deducted from your credit card account monthly, in advance, for as long as you wish to use the system.

Don't forget to print out your invoice by pressing on the blue "print invoice" button. It's not a major problem if you do forget, as you can print out an invoice at any time by logging on to the web portal and following the steps provided on page 37 of this manual.


Payments
Please print Invoice.
Print Invoice
Morton Blacketer Online Pty Ltd
First Floor, 153 Greenhill Road
Parkside, SA, 5063, Australia
Ph: +61 8 8357 9500
Fax: +61 8 8357 9400
ABN: 76 090 378 724
Email: info@mortonblacketer.com.au
Web: www.mortonblacketer.com.au
Invoice Number: 1546
Attention: US Cellar Door
Item
Cost
1x - 2008 Cellar Door Registration (01 Jan 2008 to 31 Dec 2008)
AUD$ 720.00
Total (Ex Tax)
AUD$ 720.00
Tax
AUD$ 0.00
Total (Inc Tax)
AUD$ 720.00
Terms: Payable within 30 days. Any discount may have additional terms outlined above.
This invoice will be billed in monthly installments of AUD$ 60.00
Pay Online
Pay Online
Card Type:
Visa
Card Number:
Card Holder Name:
Expiry Month:
Expiry Year:
Pay Online
Enter your credit card details and click Pay Online

Registering Cellar Doors

OK, now you have accepted the website's Terms and Conditions, entered your company details, set up your System Adminsitrator and paid for your subscription. You are nearly finished your registration. All that is left is to set up the details and facilities provided on site and through your Cellar door.

You will see in the screen shots on the following pages all of the information you need to provide. First off, will be the actuall address of your Cellar door and the appropraite contact details.

Next is checking the boxes to indicate which days your Cellar door trades. Note: Only 'check' the days your Cellar door is open. If you open for a special occasion, please refer to Helpful Hints at the back of manual for information on how to record this data.

You'll then need to go into the details and 'check' the boxes that apply to your Cellar door. For example, all Cellar doors using the system should check the boxes along side 'Visitor Count' so that they can record the number of visitors to their door. If you have a restaurant, 'check' the Restaurant Guest Count and Food and Beverage Sales boxes.

By 'checking' these boxes, you will be able to fill in this data each week – so this is an important step to ensure that you can record the information you need to track your visitor numbers and sales. If you come to enter data down the track and find that you have missed checking the appropriate box, you can return to this step to change your Cellar door set up details.

Here's a further exaplanation to help

Cellar Door:

- Visitor Count. The number of visitors to your Cellar door each day. If you have visitors, check this box.
- Sales Transaction Count. This is the actual purchases made, ie if you have 10 visitors to your cellar door but only 1 visitor purchases anything you enter 1 in this box.
- Bottles/Units Sold. How many bottles (small, large, or containers of any size) do you sell each day? If you sell in bottles or containers from your Cellar door, check this box.
- Wine Sales. To record your daily wine sales revenues, check this box. Note: If a customer purchases wine from the Cellar door for consumption within the restaurant, this would be a Cellar door, not restaurant, sale. Conversely, if they purchase wine in the restaurant, it is a restaurant, not Cellar door sale. It is important to record the information correctly to ensure that the information is correct for comparisons, trend analysis and benchmarking.
- Merchandise & Produce Sales. If you sell branded t-shirts, bottle openers, aprons, glasses etc or souvenir products such as local jams, cheese or sauces, check this box.

- Service Sales. If you charge for wine tastings or tours, check this box.
- Food & Beverage Sales. If you sell coffee, tea, water, cheese & biscuits, cakes etc specifically from your Cellar door register to eat at the Cellar door, check this box (Note: this differs to restaurant facilities).

Functions:

- Guest Count. If you provide private functions, conference, party, wedding facilities etc, check this box to record the number of people that attend functions each day.
- Function Sales. Check this box to record sales revenues from your functions.

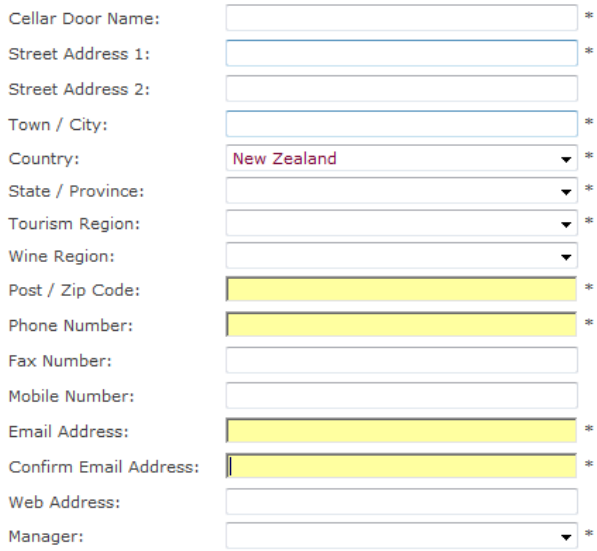
Restaurant:

- Guest Count. If you also run a restaurant, you can record the number of restaurant guests each day by checking this box.
- Food & Beverage Sales. By checking this box, you can record the sales revenues from food and beverages consumed within your restaurant (not at your Cellar door).

Accommodation:

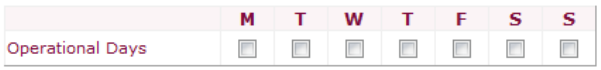
- Room Nights. If you provide accommodation at your venue, check this box to enable this data to be recorded. Room nights equates to the number of nights you have your rooms full. ie if you have 6 rooms and only 3 are full for 3 nights this is calculated as 9 nights.
- Accommodation Sales. Check this box to record the revenues from room nights sold.

Cellar Door



Fill in the boxes.

The boxes marked with "*" are compulsory



Tick the days your Cellar Door is open *

Facility Name	Category Name	Description	Date Changed	Enabled
Cellar Door	Visitors Count	Number of visitors	27 May 2008 14:19:33	☑
Cellar Door	Sales Transaction Count	Number of sales made by visitors	27 May 2008 14:19:33	☑
Cellar Door	Bottles / Units Sold	Total number of bottles / units of wine sold	27 May 2008 14:19:33	☑

Cellar Door	Wine Sales	Total wine sales through cellar door	☑
Cellar Door	Merchandise & Produce Sales	Total merchandise and produce sold	☑
Cellar Door	Service Sales	Service sold amount	☐
Cellar Door	Food & Beverage Sales	Total cellar door food & beverage sold	☐
Functions	Guest Count	Total number of people attending the function	☐
Functions	Function Sales	Weddings, private functions etc sales amount	☐
Restaurant	Guest Count	Number of restaurant guests	☐
Restaurant	Food & Beverage Sales	Total restaurant/cafe, cafe, platters	☐
Accommodation	Room Nights	Total number of rooms sold	☐
Accommodation	Accommodation Sales	Total accommodation sales amount	☐

Please tick the boxes which relate to your Cellar Door.

NOTE: Please enable facilities and categories which are in use

Click on *Save*

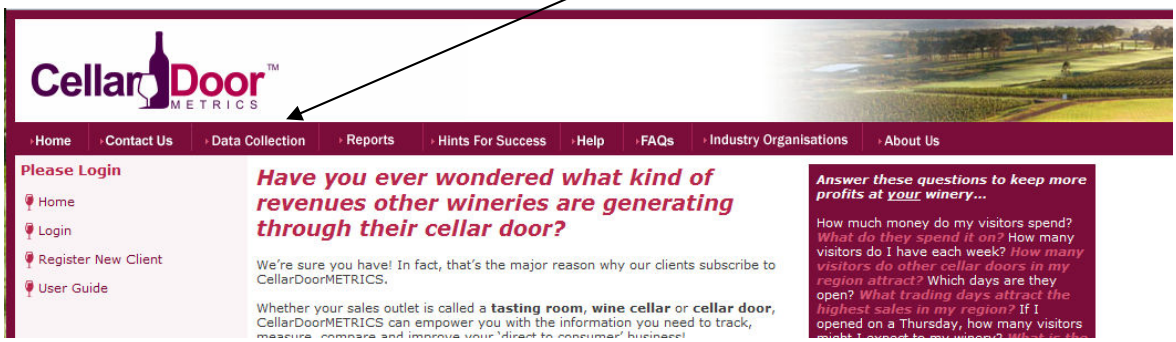
Congratulations you have now registered your Cellar door! The next step is learning how to record and enter your sales and visitor data online.

ENTERING DATA

Weekly Data Entry

In this section of the manual, we explain how to collect and record online all of the data relating to your Cellar door setup that you have just completed. We've checked with other subscribers and this task takes around ten minutes each week to update their data online.

To collect the data, CellarDoorMETRICS® provides is a **Data Collection Form** which you can download from the website – just click on the Data Collection tab. The Form can be downloaded as a .pdf or excel spreadsheet.


CellarDoor™
METRICS
Home
Contact Us
Data Collection
Reports
Hints For Success
Help
FAQs
Industry Organisations
About Us
Please Login
Home
Login
Register New Client
User Guide
Have you ever wondered what kind of revenues other wineries are generating through their cellar door?
We're sure you have! In fact, that's the major reason why our clients subscribe to CellarDoorMETRICS.
Whether your sales outlet is called a tasting room, wine cellar or cellar door, CellarDoorMETRICS can empower you with the information you need to track,
Answer these questions to keep more profits at your winery...
How much money do my visitors spend? What do they spend it on? How many visitors do I have each week? How many visitors do other cellar doors in my region attract? Which days are they open? What trading days attract the highest sales in my region? If I opened on a Thursday, how many visitors

A sample of the form is on the next page.

Weekly Data Collection Form
www.cellardoormetrics.com

Cellar Door Name				Week Beginning Monday				
Cellar Door	**Mon**	**Tues**	**Wed**	**Thurs**	**Fri**	**Sat**	**Sun**	**Total**
Visitors Count (#)								
Sales Transaction Count (#)								
Bottles / Units Sold (#)								
Wine Sales (Revenue)								
Merchandise and Produce Sales (Revenue)								
Service Sales (Revenue)								
Food & Beverage Sales (Revenue)								
Functions								
Guest Count (#)								
Function Sales (Revenue)								
Restaurant								
Guest Count (#)								
Food & Beverage Sales (Revenue)								
Accommodation								
Room Nights (#)								
Accommodation Sales (Revenue)								

Data Collection Notes

1. Bottles / units sold means single bottles of wine including promotional giveaways, but excluding tasting stock.
2. Sales Transaction Count is the total number of transactions of service, merchandise, bottles, food & bev. sales through your cellar door.
3. Merchandise and produce includes all non-wine products such as olive oil, preserves, gifts, merchandise etc.
4. Service sales includes all non-product sales such as tasting charges, winery tours etc.
5. Cellar door food and beverage includes all food and beverages served in the tasting room. This excludes any food and beverages served in a restaurant or café with a menu.
6. Restaurant food and beverages includes all food and beverages served in a restaurant or café with a menu.
7. Room nights is the number of rooms occupied, not the number of people occupying the rooms.

Weekly Data Entry

After completion of data collection, data should be entered weekly at www.cellardoormetrics.com. After data entry CellarDoorMETRICS provides trend analysis for your cellar door and comparative analysis against other cellars in your region, state and nationally.

Version 2.2 May 2008

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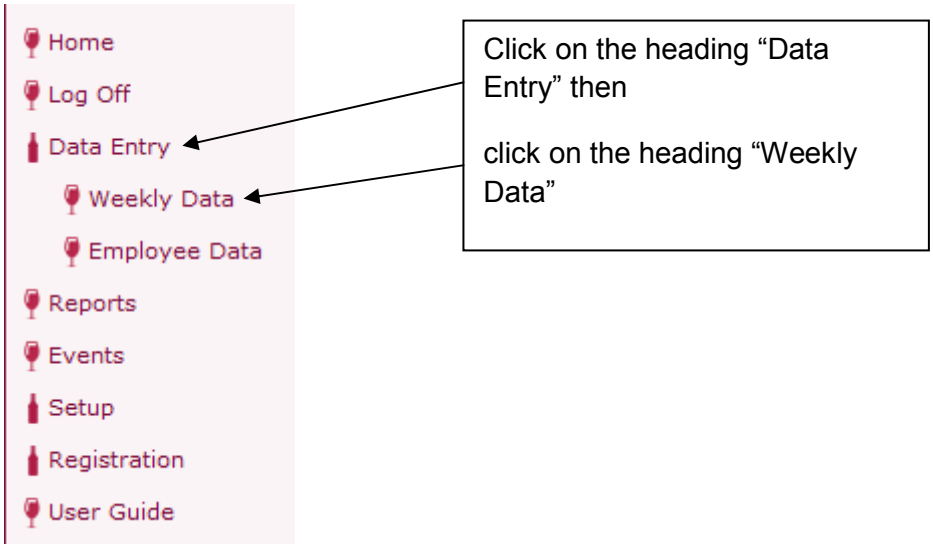
Entering the data each week provides the basis for your performance measurement. It is important to keep up-to-date with your weekly data collection and update it online for you to gain the full potential from this system. Also, entering the data weekly will only take around ten minutes but if you leave it for four weeks you'll have a forty minute job to do. From our experience, we have found most of our users enter the data on a Monday morning for the previous week.

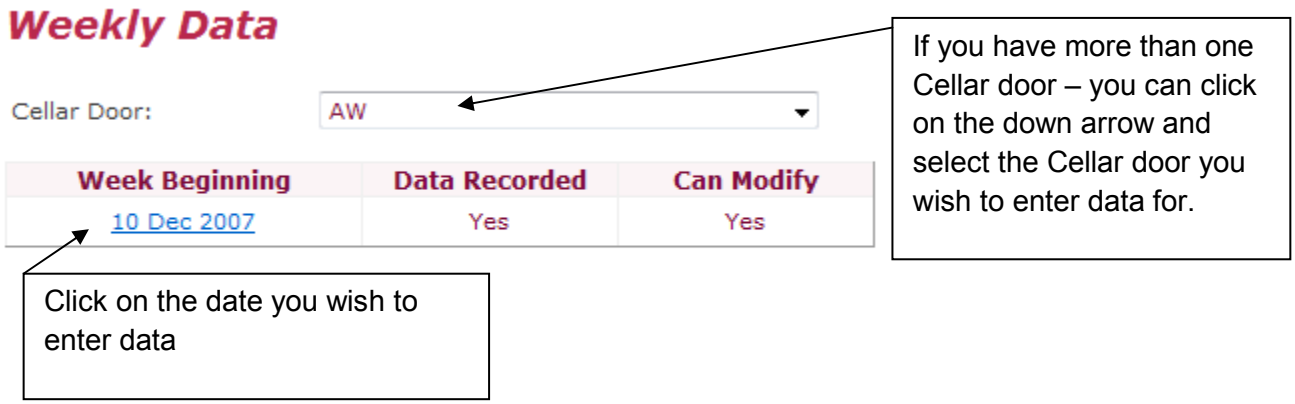
Here is an example of why weekly data entry is important.

Assume your region runs an event on the weekend and only 4 of the 10 registered Cellar doors enter their data on Monday, with the other 6 enter their data in 5 weeks time. The Industry Organisation for your area runs a report to see how the event went two weeks after the event and the figures show the event was unsuccessful. The other Cellar Doors then enter their data and it shows the event was successful.

When Cellar Doors keep their data for up to six weeks before entering it, it creates false reports as in this scenario.

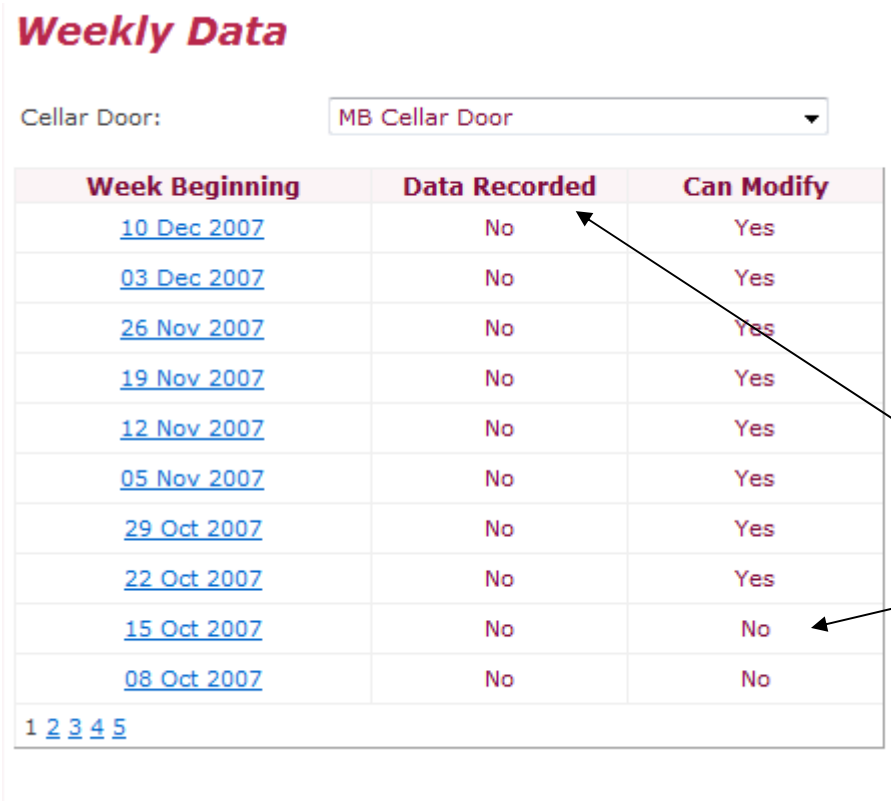


The following screen appears.


Weekly Data
Cellar Door:
AW
Week Beginning
Data Recorded
Can Modify
10 Dec 2007
Yes
Yes
If you have more than one Cellar door – you can click on the down arrow and select the Cellar door you wish to enter data for.
Click on the date you wish to enter data

Data can only be recorded from the date you sign on to the system. Please see the next page for explanations on "Data Recorded" and "Can Modify".

When you have been a member of CellarDoorMETRICS® for some time the screen will appear as below:-



Weekly Data

Cellar Door: MB Cellar Door

Week Beginning	Data Recorded	Can Modify
10 Dec 2007	No	Yes
03 Dec 2007	No	Yes
26 Nov 2007	No	Yes
19 Nov 2007	No	Yes
12 Nov 2007	No	Yes
05 Nov 2007	No	Yes
29 Oct 2007	No	Yes
22 Oct 2007	No	Yes
15 Oct 2007	No	No
08 Oct 2007	No	No

1 2 3 4 5

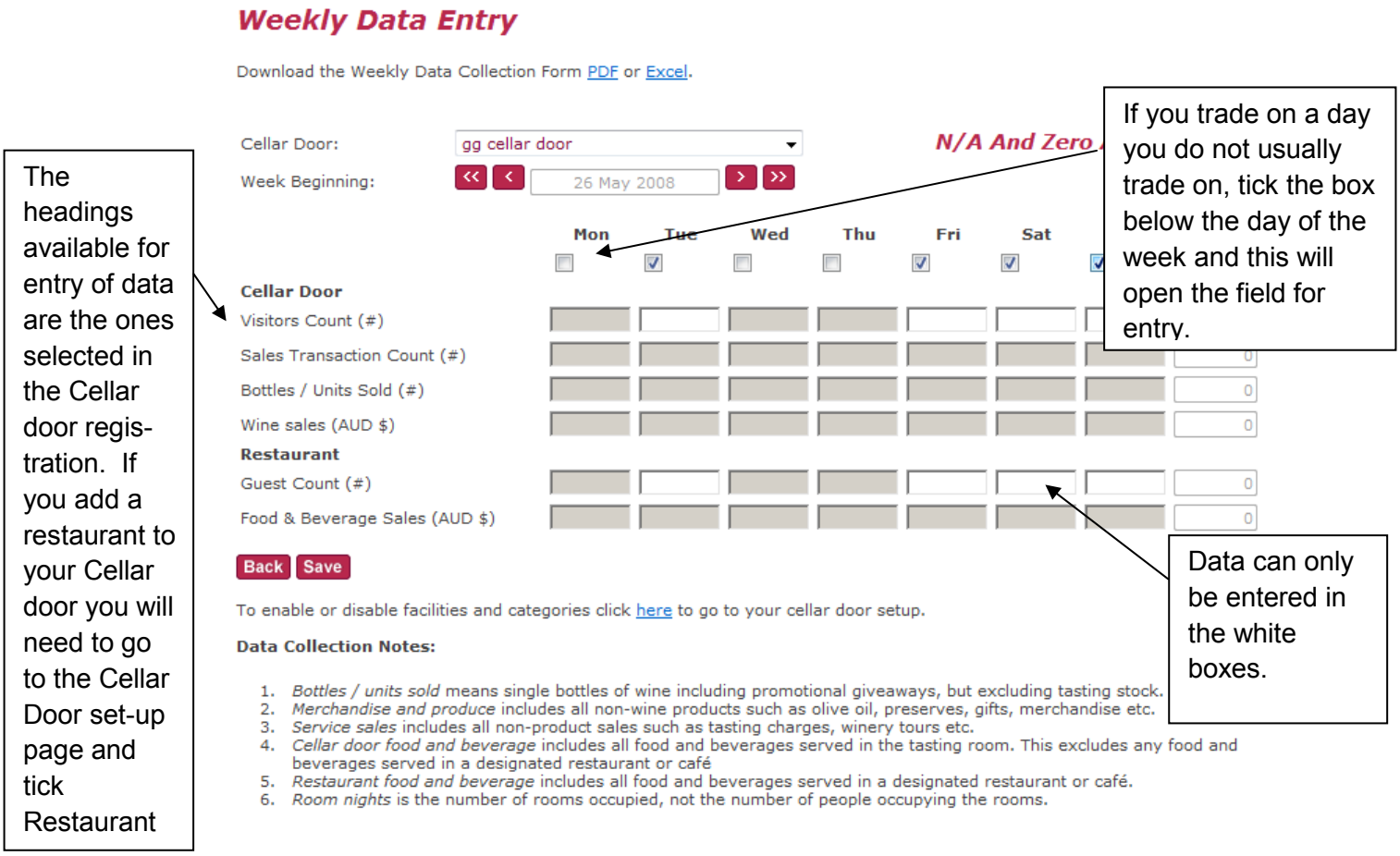
NB:

Under the “Data Recorded” heading, you can easily ascertain if you have entered data. If data has been recorded, the column will have “yes”. If no data has been recorded the column is as above “no”.

You are able to modify data for eight weeks, after this date the data is locked and unable to be edited.

This is to stop people from holding data for months and then entering as it will skew statistics.

If you have entered data and you wish to change that data because you realize that you have made a mistake. Click on the date you made the mistake, make the necessary changes, and click on Save at the end of the page. This is explained further on the following screen shot.


Weekly Data Entry
Download the Weekly Data Collection Form PDF or Excel.
Cellar Door:
gg cellar door
Week Beginning:
26 May 2008
Mon
Tue
Wed
Thu
Fri
Sat
Cellar Door
Visitors Count (#)
Sales Transaction Count (#)
Bottles / Units Sold (#)
Wine sales (AUD $)
Restaurant
Guest Count (#)
Food & Beverage Sales (AUD $)
Back
Save
To enable or disable facilities and categories click here to go to your cellar door setup.
Data Collection Notes:
1. Bottles / units sold means single bottles of wine including promotional giveaways, but excluding tasting stock.
2. Merchandise and produce includes all non-wine products such as olive oil, preserves, gifts, merchandise etc.
3. Service sales includes all non-product sales such as tasting charges, winery tours etc.
4. Cellar door food and beverage includes all food and beverages served in the tasting room. This excludes any food and beverages served in a designated restaurant or café
5. Restaurant food and beverage includes all food and beverages served in a designated restaurant or café.
6. Room nights is the number of rooms occupied, not the number of people occupying the rooms.

The headings available for entry of data are the ones selected in the Cellar door regis-tration. If you add a restaurant to your Cellar door you will need to go to the Cellar Door set-up page and tick Restaurant

If you trade on a day you do not usually trade on, tick the box below the day of the week and this will open the field for entry.

Data can only be entered in the white boxes.

Once you have entered all your data click on *Save.*

In this example, the Cellar Door is not open on Mondays (the grey boxes) and no data can be entered in these boxes. If the Cellar Door does open, for example, on a public holiday Monday - just 'check' the box below 'Monday'. The grey boxes will turn white, allowing data to be entered for this Monday, this week only.

When entering your data, you will have to think carefully when you enter a 'zero'. There are rules that you need to be aware of that impact the way CellarDoorMETRICS® calaculates and aggregates the data and entering a 'zero', indicating no sales were made on a day that you were actually closed will skew results. We have explained this in detail as follows.

Zero and N/A are Different

Close

ZERO AND 'N/A' ARE DIFFERENT

Zero should be entered when the value is actually zero

'N/A' should be entered when you do not have a value

For example: If you are open to trade and have no visitors then recording a zero is a legitimate value. Similarly, if you receive visitors and make no sales, zero is the appropriate figure to enter against sales.

However, if you leave a cell blank an 'N/A' will automatically be inserted. You would leave a cell blank if you chose to close on a regular trading day (i.e. Christmas Day) or products usually available were no longer available for sale. Therefore the correct reporting value is "Not Available" because there is no value to report.

This distinction is important because it affects the way the reports are aggregated and presented. An incorrect value will skew the data and cause anomalies affecting the integrity of the reports. For the technically inclined, each 'N/A' is counted as a non-participation value and will reduce the participation rate, but will not be included in calculating the statistical value returned. Zeros are reported as a participating value that will increase the participation rate and be included in calculating the statistical value returned.

It's also important to note that if you do not enter a positive value in Visitors Count, you will not be able to enter values in any other related cells (because the system assumes you had no visitors to sell to.)

If you require further clarification please contact us.

Employee Data

CellarDoorMETRICS® enables you to record and track your employee numbers each quarter. We will notify you on the login page when this data is due to be entered online.

The employee numbers relate to how many people you employed in your Cellar Door, function room, restaurant or accommodation facility on a fulltime, part time or casual basis.

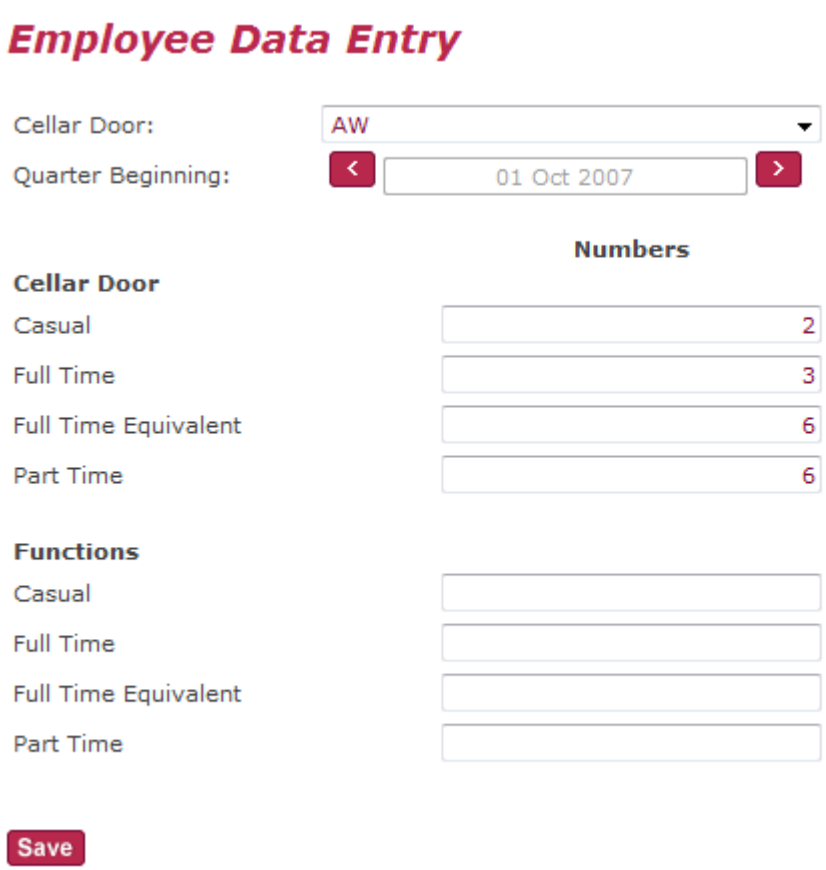
A casual employee is someone who is not entitled to either paid holiday leave or paid sick leave (such workers sometimes receive a percentage loading on their hourly rate in lieu). A more common perception is that a casual employee is someone in a job that is 'short-term, irregular and uncertain'.

Most employers define full-time employees as those who regularly work 35 to 40 hours a week. These employees typically are entitled to benefits such as paid sick and vacation leave and insurance coverage.

Part-time employees are any employees who work less than a full-time schedule and may receive some benefits

The actual number of employees is collected, not the hours worked, so even if someone only works one hour they are calculated as a count of 1.

The following screen appears.



Enter the number of people employed over the last quarter.

Once the data has been entered click on *Save*

REPORTS

Now that you have entered your data online, you can run a whole range of reports to track your own performance and compare against others.

There are a number of reports available to your Cellar Door and a brief explanation is provided in this manual, with more detail available online. In fact, when you are logged on, you should click on the Sample Report link to review what each report looks like and the information it provides. Each report also is linked to a set of Interpretation Notes. It's a good idea to read through these notes just to get a handle on how information is aggregated, averaged and presented.

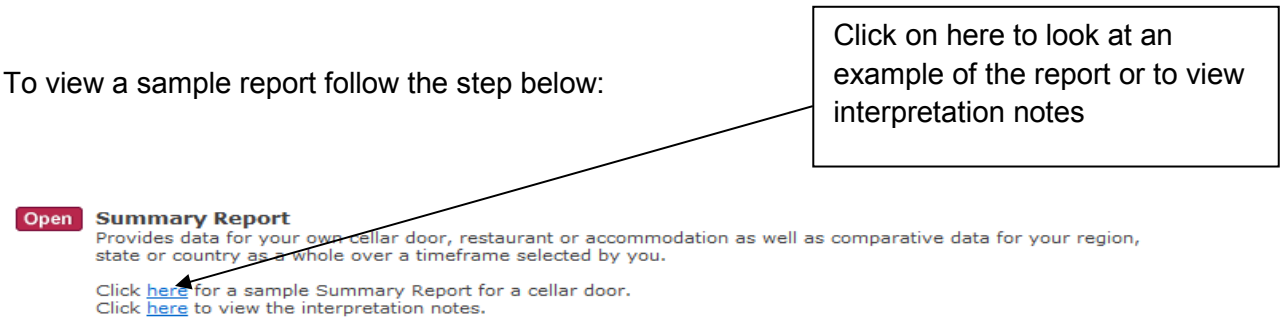
To do this, logon, click on Reports, choose a report and then proceed as follows.

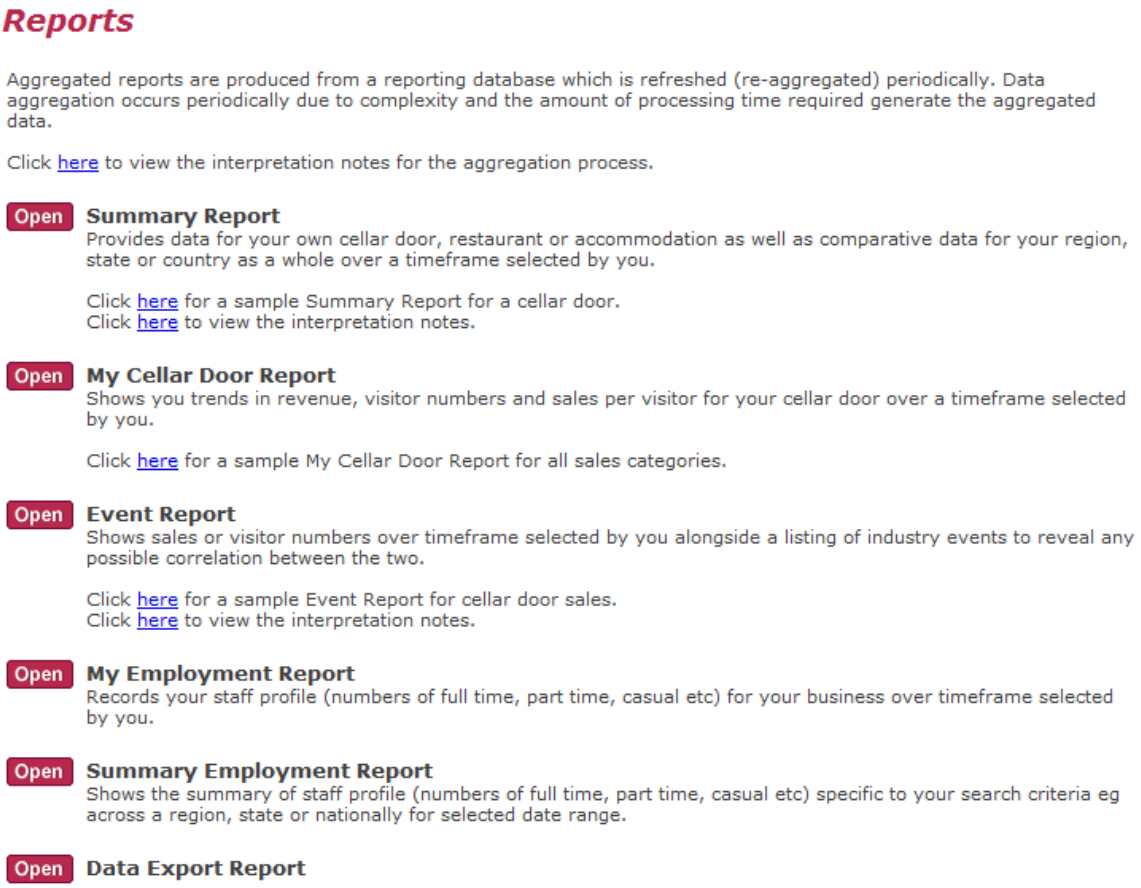
Then run a report.

The following screen appears.

Select the report you wish to view by clicking on Open .

To view a sample report follow the step below:


Click on here to look at an example of the report or to view interpretation notes
Open
Summary Report
Provides data for your own cellar door, restaurant or accommodation as well as comparative data for your region, state or country as a whole over a timeframe selected by you.
Click here for a sample Summary Report for a cellar door.
Click here to view the interpretation notes.


Reports
Aggregated reports are produced from a reporting database which is refreshed (re-aggregated) periodically. Data aggregation occurs periodically due to complexity and the amount of processing time required generate the aggregated data.
Click here to view the interpretation notes for the aggregation process.
Open
Summary Report
Provides data for your own cellar door, restaurant or accommodation as well as comparative data for your region, state or country as a whole over a timeframe selected by you.
Click here for a sample Summary Report for a cellar door.
Click here to view the interpretation notes.
Open
My Cellar Door Report
Shows you trends in revenue, visitor numbers and sales per visitor for your cellar door over a timeframe selected by you.
Click here for a sample My Cellar Door Report for all sales categories.
Open
Event Report
Shows sales or visitor numbers over timeframe selected by you alongside a listing of industry events to reveal any possible correlation between the two.
Click here for a sample Event Report for cellar door sales.
Click here to view the interpretation notes.
Open
My Employment Report
Records your staff profile (numbers of full time, part time, casual etc) for your business over timeframe selected by you.
Open
Summary Employment Report
Shows the summary of staff profile (numbers of full time, part time, casual etc) specific to your search criteria eg across a region, state or nationally for selected date range.
Open
Data Export Report

Summary Report

This report enables you to see how the performance of your Cellar door compares with others. You can select any region in any country, or a whole country's data, to compare your results.

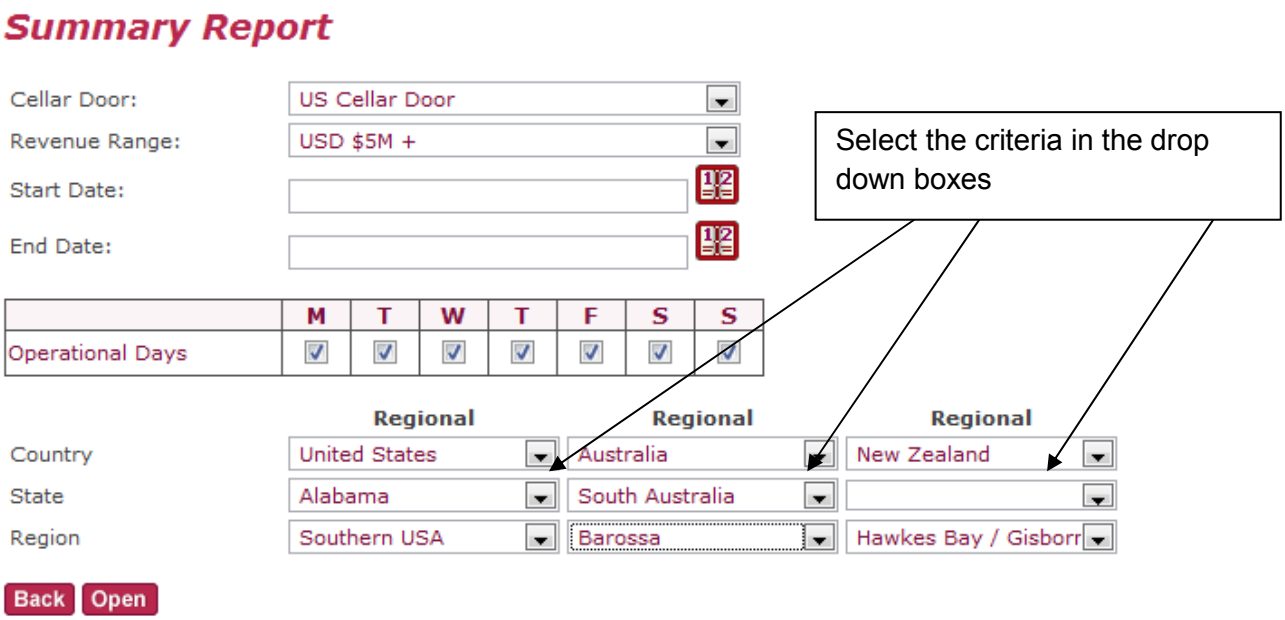
Selection criteria

The selection criteria for the Cellar Door Summary Report provide a powerful tool for Cellar doors to pinpoint and target business opportunities.

This report can be run according to the following criteria:

- Cellar door. If you have more than one Cellar door, select which one you would like to view data from.
- Revenue range. This will default to the revenue range that your Cellar door falls within (that is derived from the Company Revenue figure you entered during set up). You can select another revenue category for comparison if you wish.
- Date range. You can compare for one day, a week, ten days, months – the choice is yours. You may wish to select a period that represents when a special event or a marketing campaign was held.
- Operational days. Select one or multiple days of the week. You may only like to compare your results with others that are open on a Saturday and Sunday, or you may choose the whole week.

- Region/state/country. Select the areas you wish to compare with.



Click on Open and a .pdf of the report will appear. You can save this to your own computer to review later or print it out.

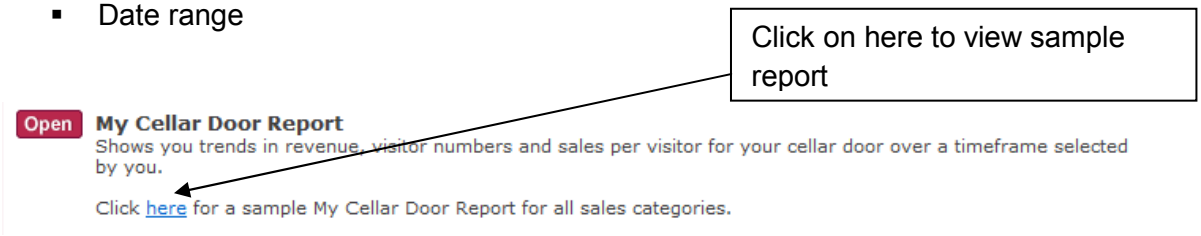
My Cellar Door Report

My Cellar Door Report enables you to look at your own data to view trends in sales revenues, bottles sold, visitor numbers and average sale per visitor etc over a period of time.

Selection screen

This report can be run according to the following selection criteria (some of which were explained in the last section):

- Cellar door
- Facility. You can view information for all of your facilities - Cellar door, functions, restaurant, accommodation – or all of them
- Date range


Click on here to view sample report
Open
My Cellar Door Report
Shows you trends in revenue, visitor numbers and sales per visitor for your cellar door over a timeframe selected by you.
Click here for a sample My Cellar Door Report for all sales categories.

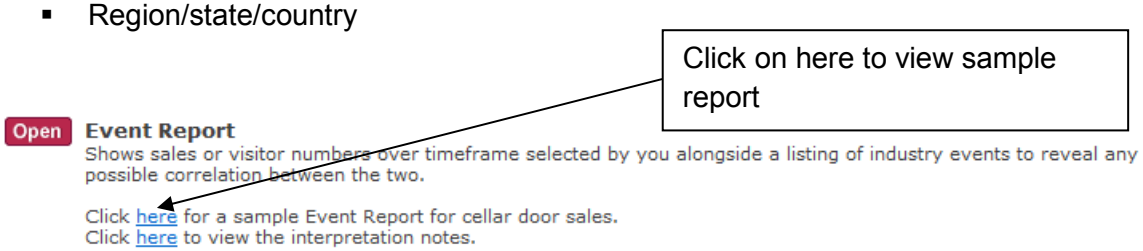
Event Report

The Cellar Door Event List Report shows Cellar door sales or visitor numbers over time, while listing events for the selected time period. The report enables Cellar doors to identify the impact of events on visitor numbers or sales revenues, and compare their results with those Cellar doors in a selected region, state or country.

Selection criteria

This report can be run according to the following selection criteria:

- Cellar door
- Average type. Select whether you would like to view your sales revenues or visitor numbers.
- Event category. Would you like to view all events or just one type, such as public holidays, sporting event, local/regional/national event?
- Date range
- Region/state/country


Click on here to view sample report
Open
Event Report
Shows sales or visitor numbers over timeframe selected by you alongside a listing of industry events to reveal any possible correlation between the two.
Click here for a sample Event Report for cellar door sales.
Click here to view the interpretation notes.

Data Export Report

The Data Export Report will allow you to export all of your data from CellarDoorMETRICS into a CSV (Comma Separated Values) file. This file can then be opened up in Microsoft Excel for further analysis.

Selection criteria

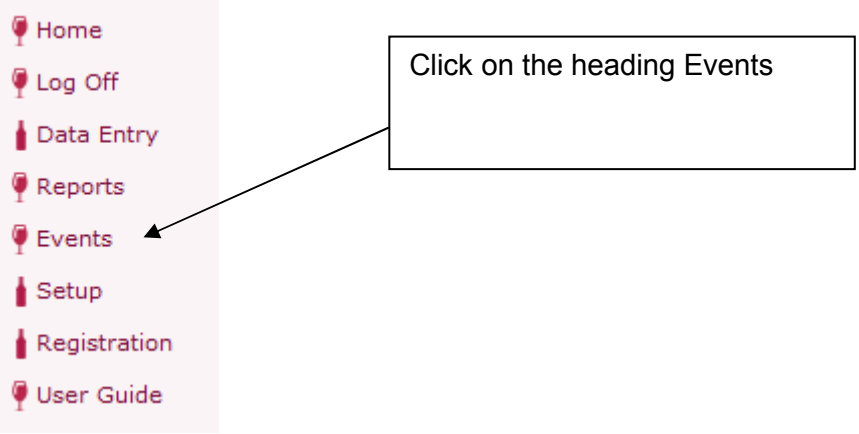
This report can be run according to the following selection criteria:

- Cellar door
- Date range (Optional)

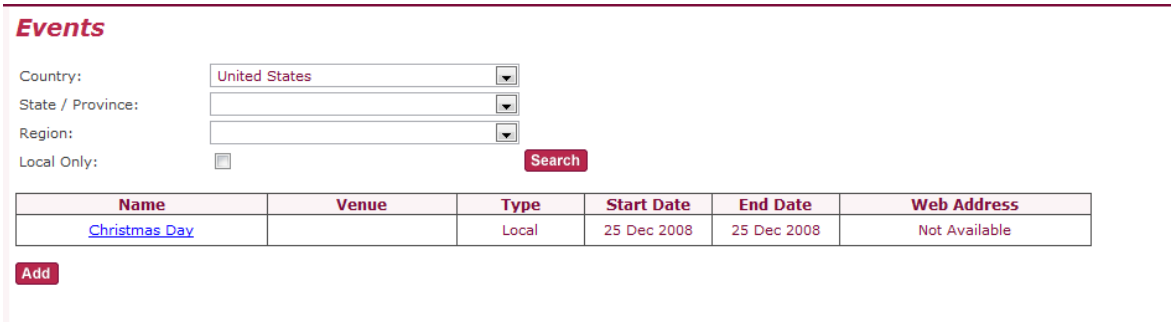
EVENTS

Both Cellar Doors and Industry Organisations registered on CellarDoorMETRICS can enter events into the system. Entering all of the events in your region will improve the accuracy and relevance of the Events List Report and enable you to judge the impact of these events on your Cellar door activities.

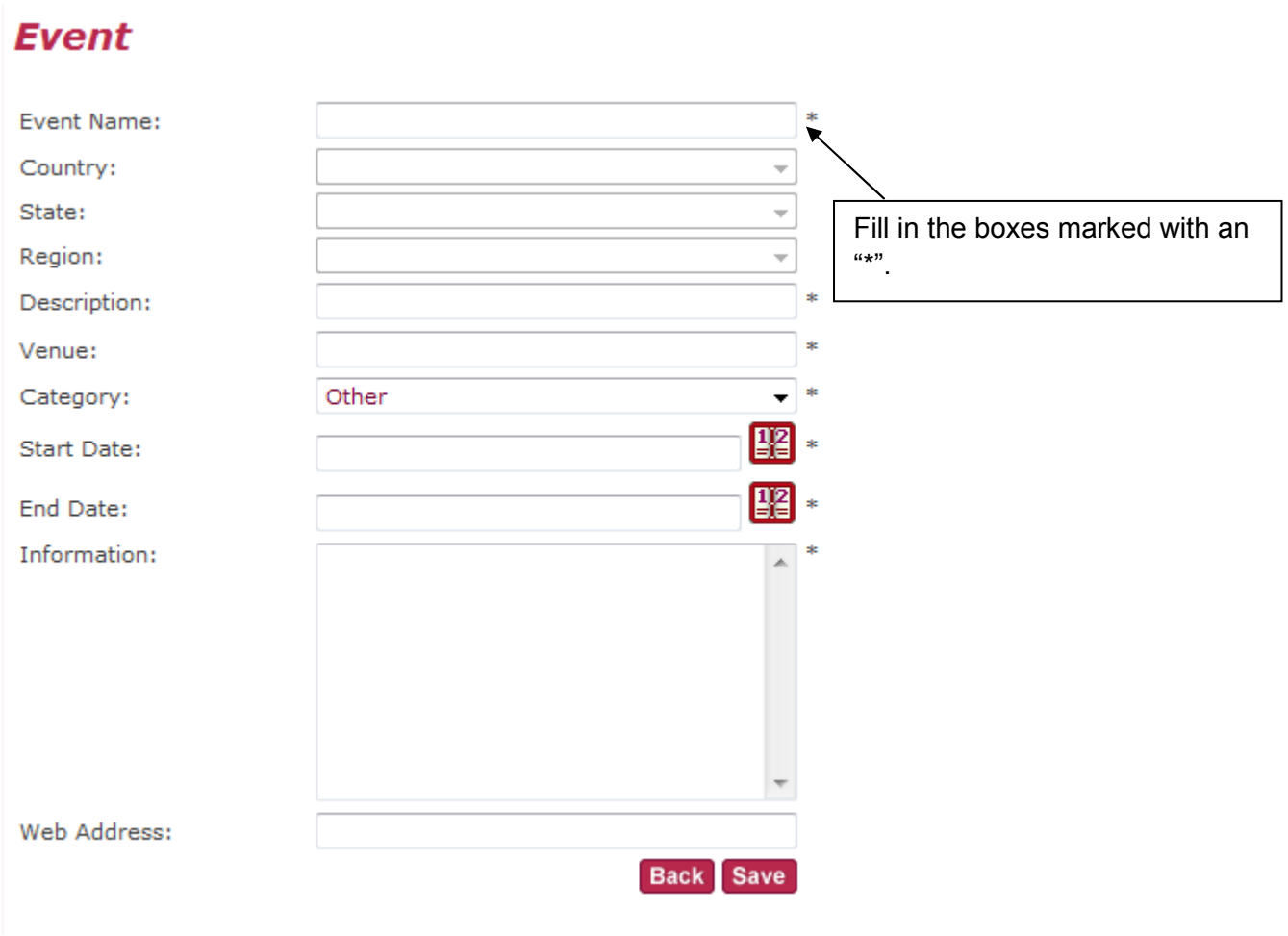
Events can be entered under a category and then this is related to reporting. For example, a national event would include a public holiday as this impact regional tourism and, therefore, likely visitors to your Cellar door. A state event may be a special event like a national football league game. A regional event would be a local festival or promotion.



The following screen appears.

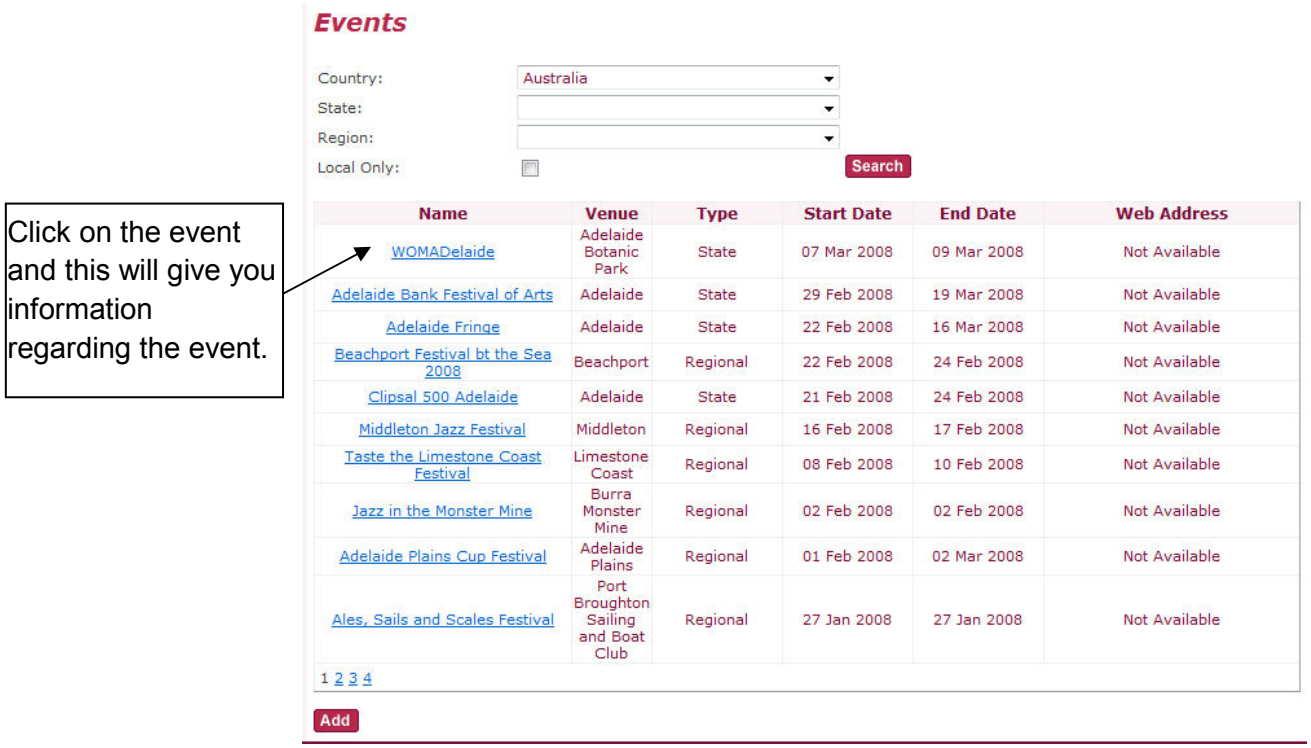


If you wish to add an event. Click on the Add button and the following screen will appear.



Once all the information has been added press *Save.*.

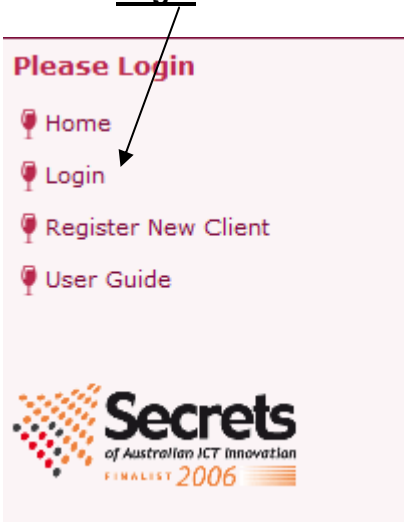
To view details about the event click on the event in blue.



Forgotten Password

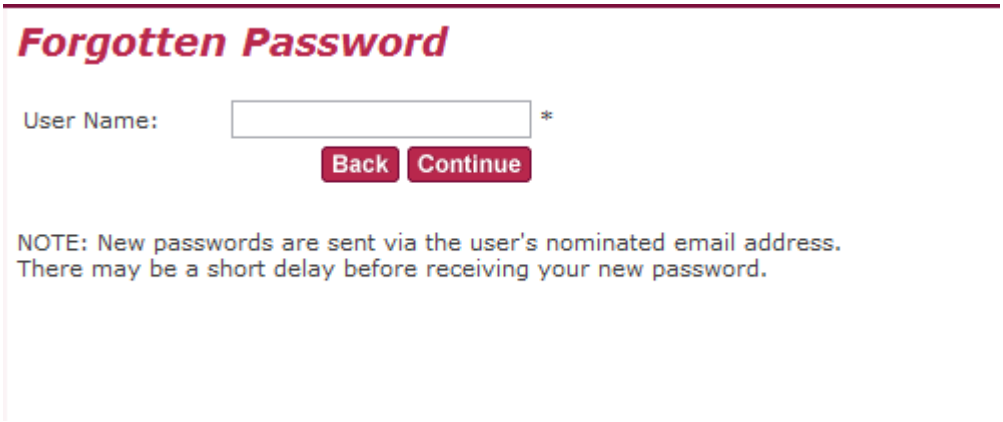
If you have forgotten your password follow these steps:-

Click on **Login**



The following screen appears.

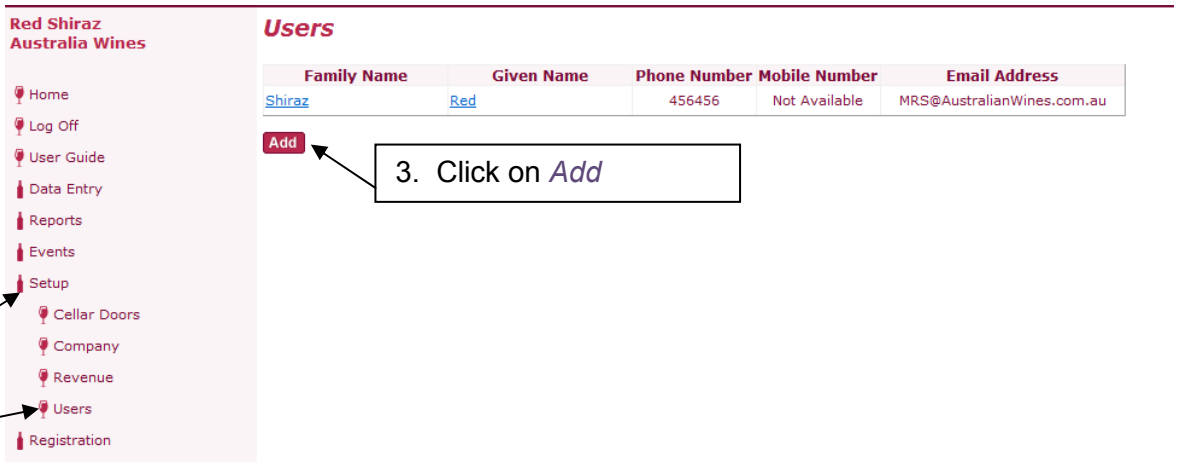
Type in your User Name and your password will be emailed to you.


Forgotten Password
User Name:
*
Back
Continue
NOTE: New passwords are sent via the user's nominated email address.
There may be a short delay before receiving your new password.

If you have forgotten your User Name please email the support line and your User Name can be sent to you. This may take up to 24 hours.

Adding/Deleting a User

You would need to add a user if a new Cellar Door Manager starts or if you wish more staff to have access to read reports and update weekly data.

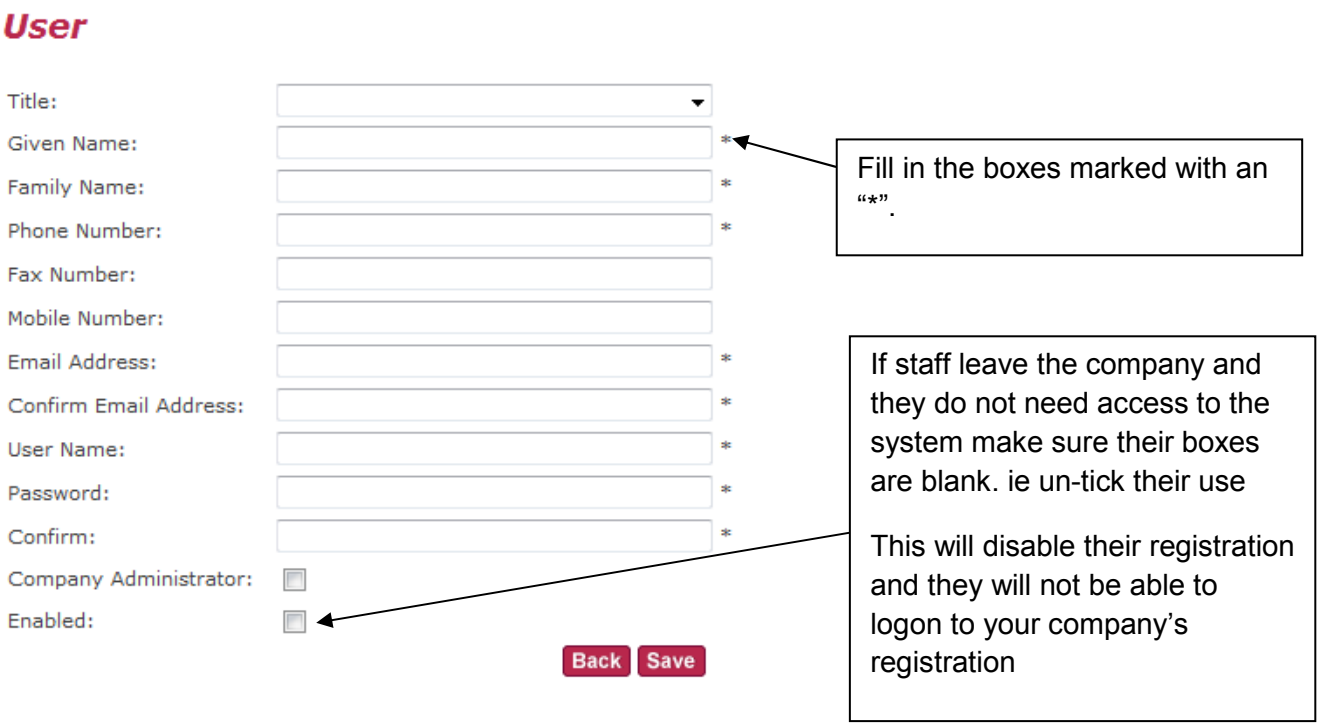


Click on Setup

Click on Users

The above screen appears when you click on Users.

The screen below appears when you click on Add



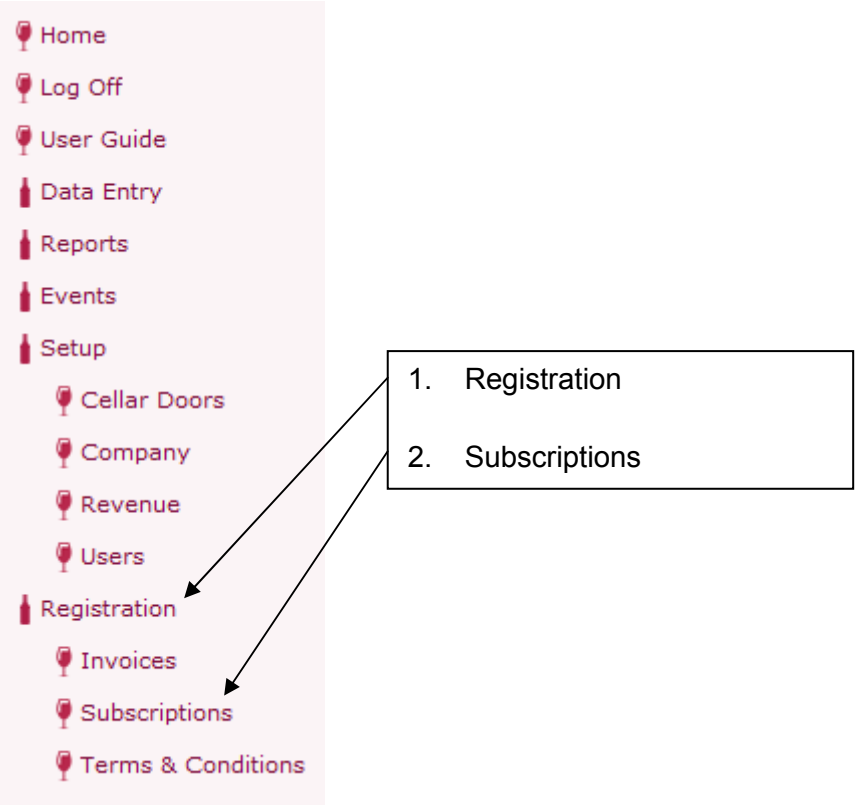
Once you have entered the details in the boxes click on *Save.*

The Company Administrator has full control of the system and can add Cellar Doors and change company information. To allow a user to enter in data - only have the enabled box ticked.

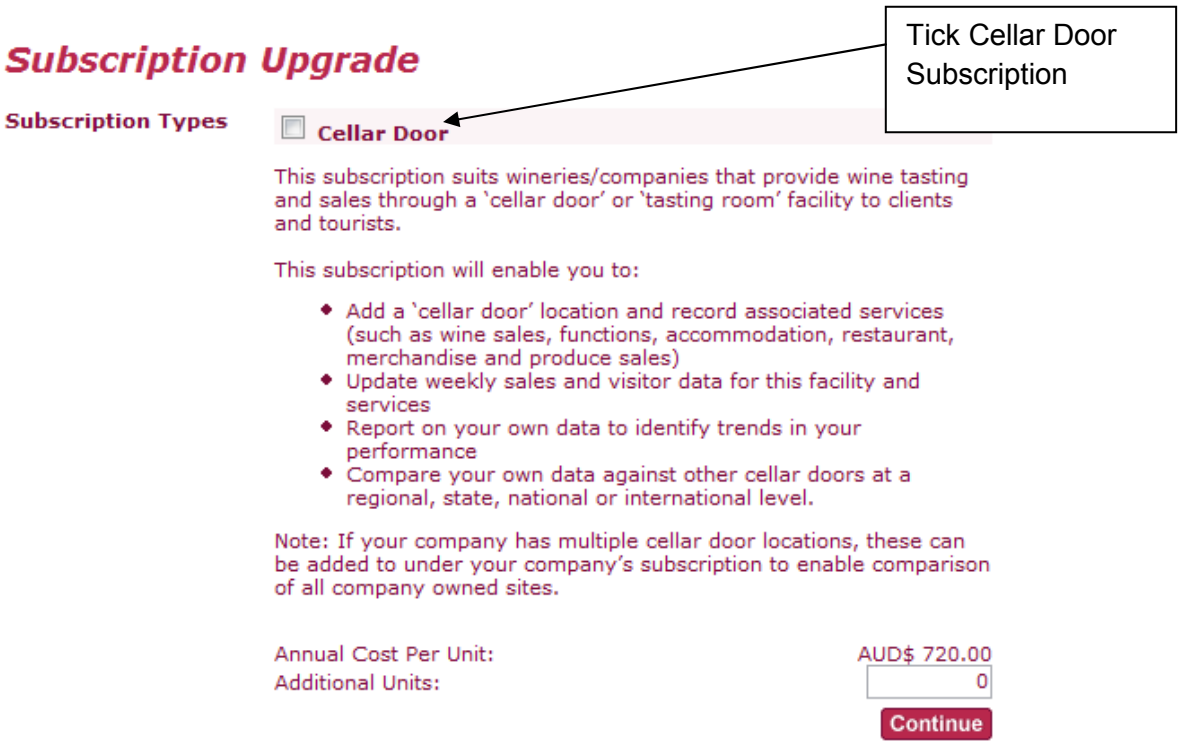
Adding a Cellar Door

If you run more than one Cellar door, you will need to purchase additional Cellar Doors. By doing so, you will be able to report on and track the performance of all of your Cellar doors using CellarDoorMETRICS®.

After the initial registration process a Cellar Door can be added by following the steps below:-



The following screen appears:


Tick Cellar Door Subscription
Subscription Upgrade
Subscription Types
Cellar Door
This subscription suits wineries/companies that provide wine tasting and sales through a 'cellar door' or 'tasting room' facility to clients and tourists.
This subscription will enable you to:
Add a 'cellar door' location and record associated services (such as wine sales, functions, accommodation, restaurant, merchandise and produce sales)
Update weekly sales and visitor data for this facility and services
Report on your own data to identify trends in your performance
Compare your own data against other cellar doors at a regional, state, national or international level.
Note: If your company has multiple cellar door locations, these can be added to under your company's subscription to enable comparison of all company owned sites.
Annual Cost Per Unit:
AUD$ 720.00
Additional Units:
0
Continue
NOTE: Choosing a subscription type automatically gives you one unit at the given price. Additional units are added on top of that.

Follow the payment options under the Registration process on page 12.

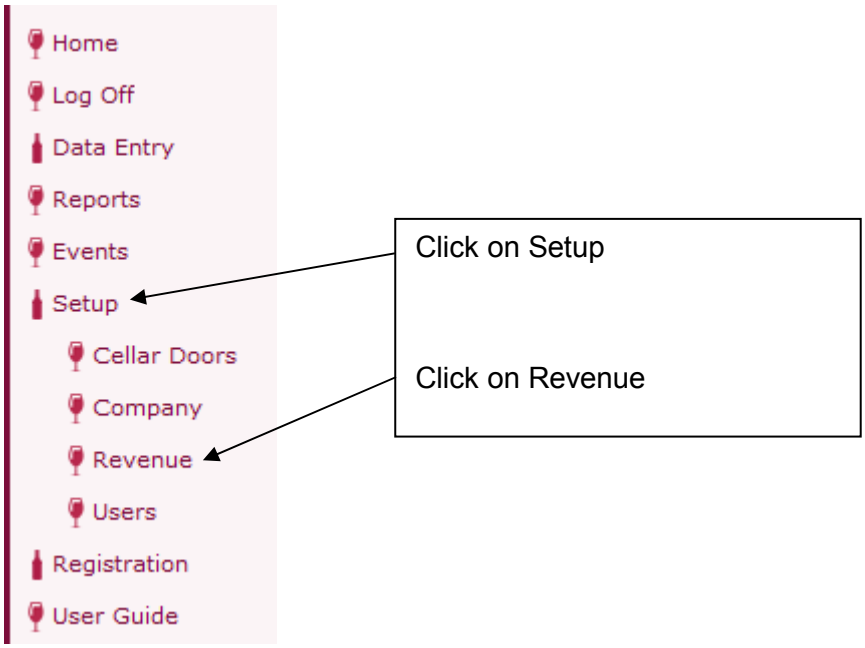
After payment you will need to set up the new Cellar Door as on page 14.

HELPFUL HINTS

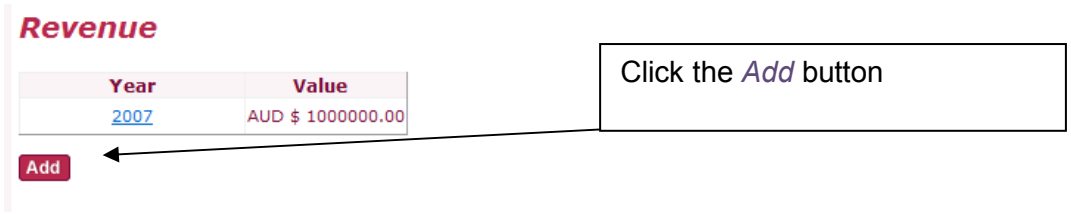
Updating Revenue

Each year you will need to update your company revenue. The system prompts you to update your company revenue each December.

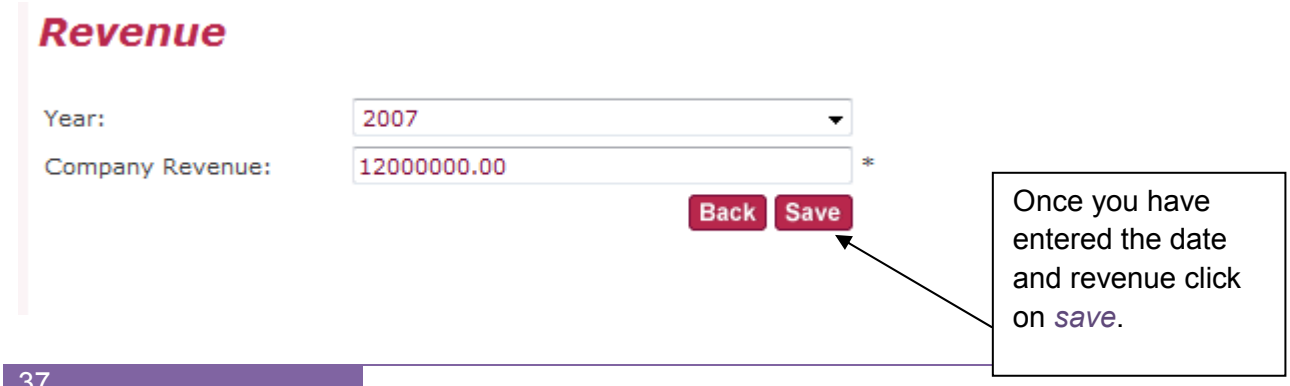
If you company revenue changes this may place you in a different bracket for comparison with other Cellar doors.



The following screen appears.

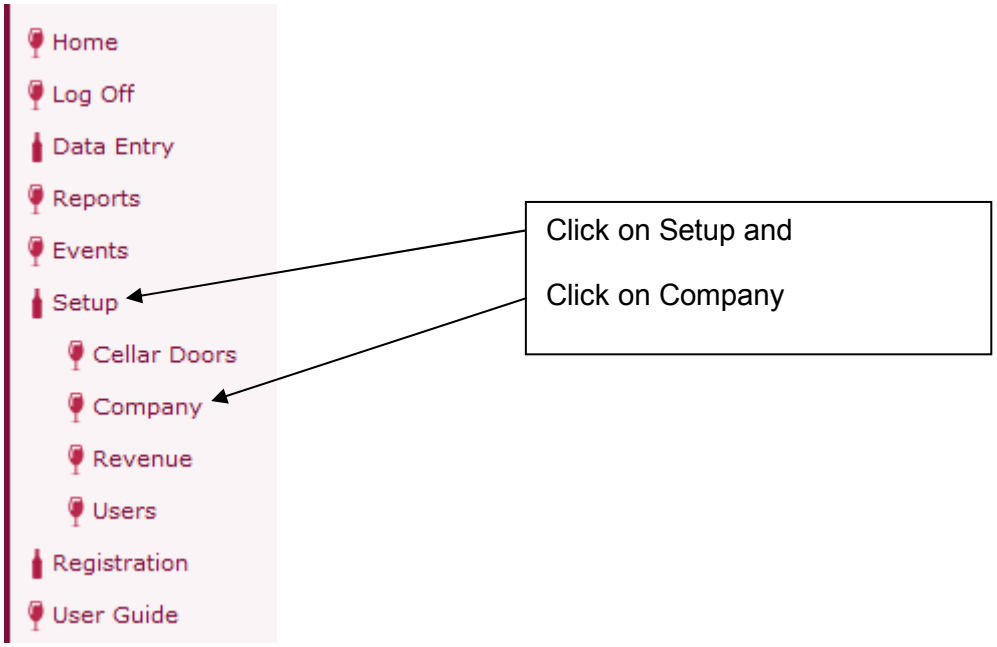


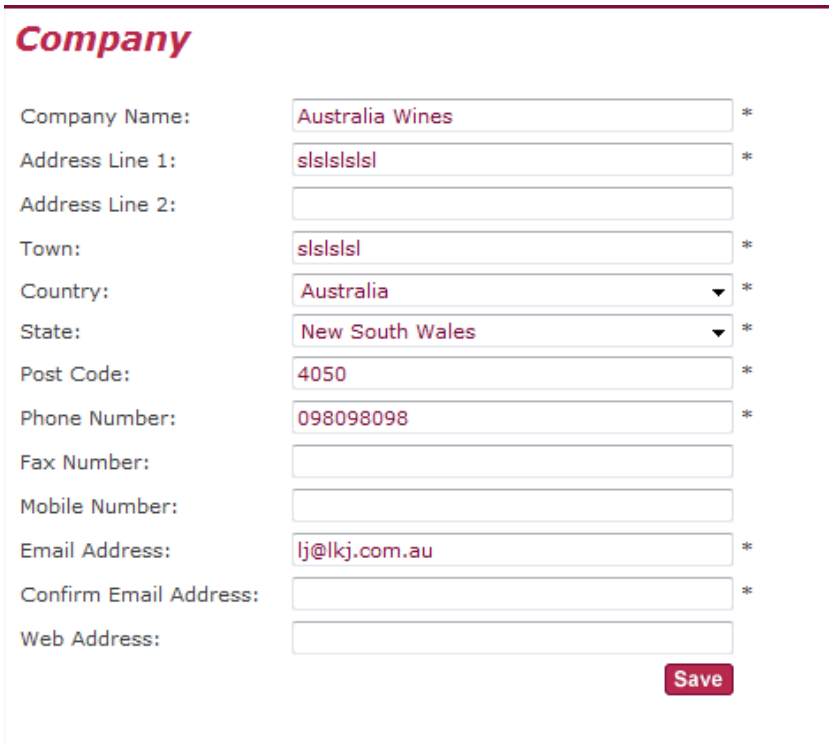
On the next screen select the right year and type in your company revenue. Please enter any values without ",".



Editing Company Details

You will need to Edit your Company Details if for example the phone number changes or email address changes.





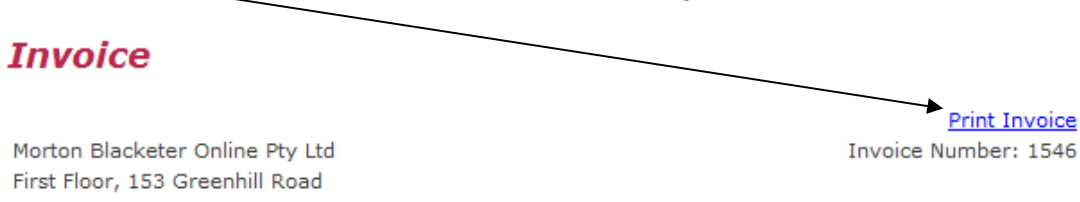
You can now change any of the company details. Once you have made all the changes click on *Save.*

Printing Invoices

If you have lost your invoice and you need it for taxation or accounting purposes you can print the invoice at any time.

The following screen appears

Then use the “blue” *Print Invoice* at the top of the page.



Time-Out

The system automatically times-out after 20 minutes under the following circumstances:-

- If you haven't clicked on the save button

If you get interrupted during your data entry follow the steps below:-

- Tab through the cells you have not entered data and press save
- You can then enter the rest of your data at a later time following the steps on page 21

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